

Kentucky Health Benefit Exchange Contact Center

Interactive Intelligence - Interaction Center User Manual



Table of Contents

1.	Customer Service Representative	5
1.1.	Managing Phone Calls	5
1.1.1.	Log on	5
1.1.2.	Set the CSR's status	5
1.1.3.	CSR Status Codes:	5
1.2.	Using the toolbar	6
1.2.1.	Answer a call	6
1.2.2.	Place a call on hold	6
1.2.3.	Disconnect a call	6
1.2.4.	Transfer and park calls	6
1.2.5.	Record the user's personal prompts	7
1.2.6.	Help	7
2.	Customer Contact Center Supervisor	8
2.1.	Phone Features/Functions	8
2.1.1.	Polycom Unit Quick Reference	8
2.2.	Interaction Client Procedures/Features	12
2.2.1.	IC 4.0 TUI	12
2.2.2.	Manage Voice Messages (1)	13
2.2.3.	Send Voicemail (4)	13
2.2.4.	Manage Personal Options (5)	13
2.2.5.	Access Company Directory (6)	15
2.2.6.	Initiate Office-wide Alert (7)	16
2.2.7.	Access Mailbox Subfolders (8)	16
2.2.8.	Access Outlook Options (9)	16
2.2.9.	Managing Phone Calls	16
2.2.10.	Transfer and Park Calls	17
2.2.11.	Working Voicemail	17
2.2.12.	Conferencing Option	18
2.2.13.	Interaction Client Options	18
2.2.14.	Tips for the Advanced User	20
2.3.	Reports	21
2.3.1.	ICS Report Listing	21
2.3.2.	Creating Reports	36
2.3.3.	Open Interaction Report Assistant File	48
2.3.4.	Recently Viewed Reports	50
2.3.5.	Saved Report Query	51

2.3.6. Edit a Report	53
2.3.7. Distributing a Report	53
2.3.8. Scheduled Reports	53
2.3.9. Determine and load output data (report) destination	58
2.3.10. Schedule the time and frequency of the report generation	59
2.3.11. Determine the report status	61
2.3.12. Activate a report	61
2.3.13. Resolve configuration errors	62
2.3.14. Historic Reports	62
2.3.15. DNIS Detail Report	71
2.3.16. Example Reports	75
2.4. Interaction Center Feedback	89
2.4.1. CFI Group's Top 10 Customer Satisfaction	89
2.4.2. Types of surveys	89
2.4.3. Creating Surveys	89
2.4.4. Survey Results	91
3. Workforce Solutions	94
3.1. Interaction Optimizer	94
3.1.1. Scheduling Process	94
3.1.2. Volume Forecasting	97
3.1.3. Headcount Forecasting	116
3.1.4. Schedule Generation and Administration	136
3.1.5. Time Off Requests	139
3.1.6. Reports	144
4. HELP (Additional Information)	160
4.1.1. Search	160
4.1.2. Change User's Password	160
4.1.3. Logon dialog box	161
4.1.4. Status Bar	162
4.1.5. Working with Calls	162
4.1.6. Call Transfer Shortcut Keys	164
4.1.7. Whisper Mode	168
4.1.8. Call History	168
4.1.9. Camp Desktop Alert	169
4.1.10. Using the Dial Pad	170

Document Control Information

Document Information

Document Name	HBEC Service Guide
Project Name	Kentucky Health Benefit Exchange Contact Center
Client	Kentucky Cabinet for Health and Family Services
Document Author	Xerox Business Services
Document Version	V0.01
Document Status	Draft
Date Released	

Document Edit History

Version	Date	Description	Author	Approver
0.01	06/12/13	Initial draft	Bill Daws	

Confidentiality Statement

©2013 Xerox Corporation. All rights reserved. Xerox® and Xerox and Design® are trademarks of the Xerox Corporation in the United States and/or other countries. Other company trademarks are also acknowledged.

No part of this document may be modified, deleted, or expanded by any process or means without prior written permission from Xerox.

Approvals

	Submitting Organization's Approving Authority	CMS's Approving Authority
Signature		
Printed Name		
Position		
Phone Number		
Date		

1. Customer Service Representative

1.1. Managing Phone Calls

The Customer Service Representative logs on and off of the system through Single Sign On. Once logged on, the CSR will control how they receive calls through their status. There are different types of status a CSR would use from the table below.

1.1.1. Log on

- CSRs will log into the phone system through Single Sign On

1.1.2. Set the CSR's status

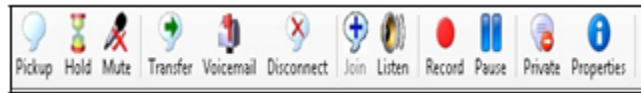
- Click the arrow at the end of the My Status box.
 - Or in the notification area of their taskbar (located at the bottom right side of their main window), right-click their Interaction Client status icon.
 - Or in the Company Directory, right-click their name and choose Change User's Status.
- Choose a status from the menu and, if applicable, click the OK button. Once in Available calls will automatically come in and be answered so it is important to be ready to take a call when going into and while in available.

1.1.3. CSR Status Codes:

Status	Used For
Available	Receive Calls
Available No ACD	Await Transfer
At A Training Session	For scheduled training
Coaching	Scheduled and unscheduled coaching
In a Meeting	Team meetings, other as advised
Break	Assigned breaks, unscheduled breaks
Special Project	Assigned special tasks/ Projects
Email	Working Email Queue
TDD/TTY	Working TDD/TTY Line

1.2. Using the toolbar

Use buttons on the Interaction Client .NET Edition toolbar to help manage the CSR's calls. Many of these functions are also available by right-clicking a call.



1.2.1. Answer a call

- If the CSR are not connected to another call, pick up their telephone handset.
- If the CSR are connected to another call, click the
- Pickup button. The first call is placed on hold.

1.2.2. Place a call on hold

1. Click the call that the CSR wants to put on hold, then click the Hold button, or right-click it and choose Hold.
2. To reconnect to the call, click Hold again.
3. To suppress hold music for the caller, click Mute before or after clicking Hold.

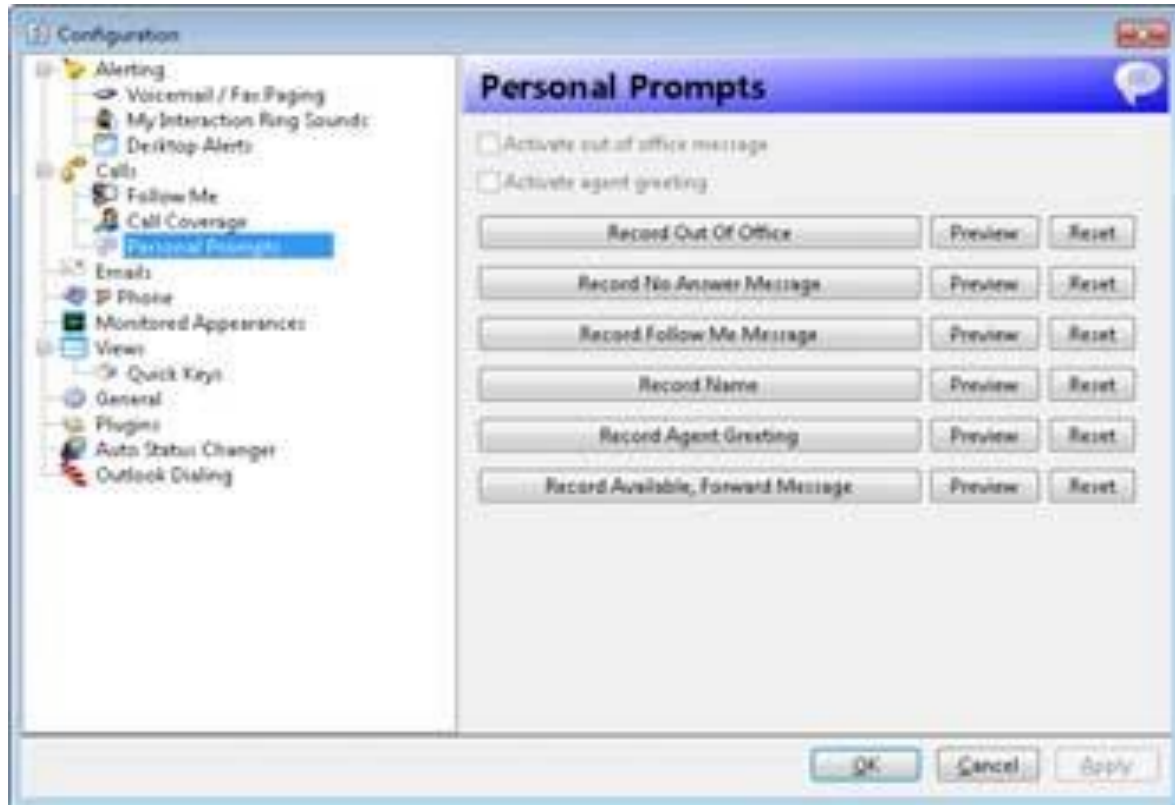
1.2.3. Disconnect a call

1. To disconnect a call with their handset, just hang up the telephone.
2. To disconnect a call with the client:
 - Highlight the call to disconnect.
 - Click the Disconnect button or right-click the call and choose Disconnect.

1.2.4. Transfer and park calls

1. Inform the caller of the transfer and on the Call Control toolbar click the Transfer button. The Transfer dialog box opens.
2. In the Transfer To: field, type all or part of the recipient's name or number. In the dropdown list that appears select "Dial [their entry] as Digits" to convert a text entry into numbers or select the appropriate contact name and associated extension or phone number.
3. Click the Transfer button or choose from the following transfer options:
 - Park: Place a call on hold in the recipient's My Interactions queue.
 - Voicemail: Direct the call to a recipient's voicemail.
 - Consult: Opens the Consult Call dialog box and allows them to select the Consult button to speak to the transfer recipient while their caller stays on hold or the Caller button to speak to the caller without exiting the transfer operation, or the Transfer Now button if the recipient answers the phone and agrees to the transfer.

1.2.5. Record the user's personal prompts



1. Open the Options menu, click Configuration..., expand the Calls node and click Personal Prompts.
2. In the Personal Prompts page, click the button of the prompt they want to record. Interaction Client initiates a call to their station.
3. Pick up the call and record the prompt, then press 1 to end the recording.
4. To review a recorded prompt, click the Preview button.
5. To return a prompt to a generic recording, click the Reset button.
6. Click Apply to save their changes.

1.2.6. Help

If the CSR has a question about how to do something, open the Help menu and click Help Contents (or press the F1 key), then click or search for a topic on which they want more information.

2. Customer Contact Center Supervisor

2.1. Phone Features/Functions

2.1.1. Polycom Unit Quick Reference

- **Features**
 - Hard-coded keys: The user's phone has these pre-stamped feature keys: Dial, Menu, Line 1, Line 2 (or Messages), Hold, Headset, Speakerphone, Mute, Volume (+ / -), and menu navigation keys.
 - Soft keys: Depending on the state / activity on the phone (e.g. idle or on a call), there will be one or more context-sensitive features offered on the display (e.g. New Call, End Call, Transfer, Conf, etc.). Press the corresponding key beneath the display to use the feature.
- **Volume Control**
 - Ringer: While the phone is ringing or not in use, the + / - buttons control the ringer volume.
 - Remote Party: While on a call, the volume buttons control the volume of the remote party, and is independently set for handset, headset, or speakerphone.
- **Placing a Call**
 - Internal: Dial the 4-digit extension number
 - External: No need to enter 9 or 1 for outside line access or long distance!
- **Ending a Call**
 - Handset: If talking via the handset, hang up the handset or press the End Call soft key.
 - Speakerphone: If talking via speakerphone, press the Speaker button or the End Call soft key.
 - Headset: If talking via a headset, press the Headset button or the End Call soft key.
- **Answering a Call**
 - Handset: Lift the handset
 - Speakerphone: Press the Speaker button
 - Headset: Press the Headset button
 - Answer: Pressing the Answer soft key will answer the call on speakerphone, unless the user's handset is already off-hook or the user can use a headset.
 - Ignore: Pressing Ignore stops the ringing, but the call still flashes on the line key and the caller still hears ringing. If they don't answer, the call will roll to their voice mail or other programmed destination.
 - Reject: Pressing More, and then Reject removes the incoming call from the user's phone; but the caller still hears ringing until the call forwards to voice mail or other programmed destination.
- **Muting**
 - Press the Mute button (microphone icon) while on a call to toggle the microphone on and off – whether the user is talking via handset, headset, or speakerphone. While their microphone is muted, there will be a red light at the top of the phone and the microphone muted icon will flash on the phone display. While the user's microphone is muted, the user can hear the other party, but they cannot hear the user.

- **Redialing**

- Press the Dial button or the right navigational arrow to display the Placed Calls list. Press the up or down arrow buttons to scroll through the list, and then press Dial to call the displayed number. The user can press the right arrow for more options.
- Press Callers to display the Received Calls list. Scroll through the list and press Dial to call the displayed number. The user can press the right arrow for more options.

- **Placing a call on hold**

- Put a call on Hold: Press the Hold button. Then the user can press the New Call soft key to place a 2nd call, or hang up the handset until they are ready to take the call off hold.
- Take a call off Hold: BEFORE lifting the handset, press the red-flashing held line key, or the Resume soft key, or the Hold key. Important: If the user lifts the handset before taking the call off hold, the system assumes they want to place a separate call, so they will hear dial tone. From there they can press End Call and Resume to return to held call.

- **Transferring a call**

*** Note: The Transfer feature will appear for a soft key when the user has a caller on the line.**

- Consult Transfer (Allows the user to check if the other person is there and the user can talk privately with them before completing the transfer)
 1. Press Transfer (do not put the caller on hold first)
 2. Enter the number to transfer to and press Send
 3. Wait for the other party to answer to see if they can take the call, or to see if voice mail picks up
 4. If the other person answers and can take the call, press Transfer – OR --
 - Cancel: If the user gets their voice mail, press Cancel to return to the caller (just hanging up will NOT put the caller into voice mail!) Then transfer directly to their voice mail (see below)
 - Cancel: If they answer, but do not want to take the call, press Cancel to return to the caller. If they want to leave a message, transfer the caller directly to their voice mail – see below.
- Blind Transfer (Transfers the caller without the user connecting to/talking to the 3rd party first)
 1. Press Transfer
 2. Press Blind
 3. Enter the number to transfer to and press Send
- Transfer a caller directly to someone's voice mail
 1. Press Transfer
 2. Press Blind
 3. Enter the number to transfer to, and immediately press the star (*) button

- **Conference (3 parties)**

1. With a caller on the line, press Confnc (this puts the caller in a holding mode)
2. Enter the number to conference in and then press Dial to dial their number
3. Wait for the 3rd party to answer, and then ask if they can join the user on a conference call
4. Press Conference to join all 3 parties – OR --
 - Cancel: If the 3rd party does not answer or cannot join the conference, press the Cancel soft key to disconnect the 3rd party and return to the 1st party.

- **Checking messages (voicemail)**

- Press the Messages button. (It might be configured for the user to press * + Dial; or extension _____).
- At the menu, press the # button
- Enter the user's extension + password + #
 - To set password from the user's mailbox Main Menu:
 - Option 5 - Manage Personal Options
 - Option 3 - Change Their IC Password
 - Follow the prompts to enter a new password
 - Passwords must be minimum of ____ digits and contain at least ____ different digits.
- **Creating the user's mailbox name**
 - From the user's mailbox Main Menu:
 - Option 5 - Manage Personal Options
 - Option 5 - Manage Personal Prompts
 - Option 5 - Record their Name
 - Follow the prompts to Record and Save.
- **Creating the user's mailbox greeting**
 - From their mailbox Main Menu:
 - Option 5 - Manage Personal Options
 - Option 5 - Manage Personal Prompts
 - Option 3 - Record No Answer / Standard
- **Creating out-of-office mailbox greeting**
 - From their mailbox Main Menu:
 - Option 5 - Manage Personal Options
 - Option 5 - Manage Personal Prompts
 - Option 1 - Record Out of Office Greeting: This greeting plays when their Status is a NON-Available one and calls go directly to voice mail.
 - Option 7 - Activate Out of Office Greeting

***Note: Personal out-of-office greeting must have the following steps completed...**

- 1. Record & Save the user's Out of Office greeting**
- 2. Activate their Out of Office greeting**
- 3. Set the User Status to a non-available one**

If the user uses Interaction Client software and are logged in with an Available status, they will hear the user's mailbox main menu. If they are not logged in or their status is not available, they will be prompted to enter their extension + Password + # to get to their mailbox main menu.

- **Setting the User Status**
 - Do Not Disturb On
 - On their Polycom phone, press Menu
 - Select 1 - Features
 - Select 2 - Do Not Disturb
 - Press Menu
 - The user's phone display will show Do Not Disturb & their calls will go to their voicemail, unless something different is configured for the user.
 - Do Not Disturb Off
 - Press Menu
 - Select 1 - Features

- Select 2 – Do Not Disturb
- Press Menu
- To Change the User's Status Via The Phone:
 - From their mailbox Main Menu:
 - Option 5 -- Manage Personal Options
 - Option 1 – Set User Status
 - Select the appropriate Status (1 thru 15) from the list of Statuses that are played.
- Default Status
 - 1 = Available (allows ACD Q call delivery)
 - 2 = Available, Forward
 - 3 = At a Training Session
 - 4 = At Lunch
 - 5 = Do Not Disturb
 - 6 = (not used)
 - 7 = Gone Home
 - 8 = In A Meeting
 - 9 = Away From Desk
 - 10 = Available, No ACD
 - 11 = On Vacation
 - 12 = Out of the Office
 - 13 = Out of Town
 - 14 = Working at Home
 - 15 = Available, Follow Me
- **Generic Voicemail options**
 - Skip over someone's greeting and get to the recording beep by pressing 1-1.
 - Leave someone a message without ringing their phone: From a phone on the same system, enter their extension + star (*)
 - Voice mail attached to email: If the user is configured to receive voice mail attached to an email, then they can easily listen, forward, save, and delete messages just like they would any other email.
 - Voice mail via the phone: If they call into their mailbox via the telephone, the following are some common tasks when listening to messages:
 - Listen to messages: Mailbox Main Menu > 1-1
 - Forward a message to another mailbox on the same system: During or after message playback, press 2 to Forward and then follow the prompts. Then the user can save or delete the message from their mailbox.
 - Delete a message: During or after message playback, press 7 to Delete the message.
 - Undelete a message: If they deleted a message and haven't hung up from the voice mail session yet, then from their mailbox Main Menu, press 5-7 and follow the prompts.



2.2. Interaction Client Procedures/Features

2.2.1.IC 4.0 TUI

Features always available:

- Return to previous menu *
- Finish a command or entry #
- To forward voicemail, fax, or email to multiple extensions, separate the extension with # and end with ##

During message playback, the user can:

- Save current message - 1
- Forward message to extension - 2
- Skip to next message - 3
- Replay current message - 4
- Rewind 6 seconds - 5
- Fast forward 6 seconds - 6
- Delete this message, play next - 7
- Slow down voicemail playback - 8
- Speed up voicemail playback - 9

****Some options require Interaction Media Server enabled for Advanced Operations. Contact the User's IC Administrator if they have questions.***

Enter the Interaction Mail system:

- Dial voicemail system number: **<Place Holder>**
- Dial access code (i.e. 99 + "extension" + "password": **<Place Holder>**
- Enter # to complete the access code.

Mail Interaction Mail Options

- Manage Voice Messages – 1
- Manage Faxes - 2
- Manage Email - 3
- Send Voicemail - 4
- Manage Personal Options - 5
- Access Company Directory - 6
- Initiate Office-wide Alert - 7
- Access Mailbox Subfolders - 8
- Access Outlook Options – 9

2.2.2.Manage Voice Messages (1)

- Listen to All New Messages – 1
- Listen to Saved Messages – 2
- Listen to Today's New Messages – 3
 - 1 – Save current voicemail
 - 2 – Forward message to extension
 - 3 – Skip to next message
 - 4 – Replay current message
 - 5 – Reply to current message
 - 6 – Play envelope information
 - 7 – Delete this message, play next
 - 1-Delete all with this subject
 - 2-Delete all addressed to this recipient list
 - 8 – Play text in message body

2.2.3.Send Voicemail (4)

- Listen to All New Emails – 1
- Dial by name (optional) – 2
- Play list of workgroups (optional) – 3
- Enter one or more extensions (separated by #, end lit with ##)
- Record message:
 - 2 – Review message
 - 3 – Rerecord message
 - 4 – Send message and return to Main Menu
 - 5 – Cancel message and return to Main Menu
 - 6 – Set Priority *
 - 1-High
 - 2-Low
 - 3-Normal
 - 7 – Set Sensitivity
 - 1-Normal
 - 2-Personal
 - 3-Private
 - 4-Confidential

****This option is available only if configured by the user's IC Administrator.***

2.2.4.Manage Personal Options (5)

- **Set User Status (1)**
 - 1 - Available
 - 2 - Available at a forward number
 - 3 - At a training session
 - 4 - At lunch
 - 5 - Do not disturb

- 7 - Gone home
- 8 - In a meeting
- 9 - Away from desk
- 10 - Available, No ACD
- 11 - On vacation
- 12 - Out of the office
- 13 - Out of town
- 14 - Working at home
- 15 - Available, follow me routing

*Optionally set date, time, or both, depending on status.

- **Set Forward Number (2)**

- 1 - Enter remote phone number (+ #)
- 2 - Enter call coverage setting
 - 1-Modify forward coverage option
 - 2-Modify DND coverage options
 - 3-Modify phone coverage options
 - 4-Modify "no answer" coverage: The first four options can be set to work with these calls...
 - 1-All 3 External
 - 2-Internal 4 Unknown
 - 5-Change coverage phone number; Enter an internal number or IC extension followed by #.
 - 6-Modify voicemail destination
 - 1-Set my voicemail box
 - 2-Specify call coverage mailbox #

- **Change IC Password (3)**

Entering 1 to 10 character password followed by #

- **Set Playback Options (4)**

- 1 - Message playback mode: 1=Verbose 2=Brief
- 2 - Message sorting: 1=Oldest, first 2=Newest, first
- 3 - Play high priority messages first: 1=Activated 2=Deactivate
- 4 - Play mailbox extension greeting: 1=Activated 2=Deactivate
- 5 - Play current status greeting: 1=Activated 2=Deactivate
- 6 - Configure available message type 1=Voicemail 2=Fax 3=Email
- 7 - Configure saved message type 1=Voicemail 2=Fax 3=Email

- **Manage Personal Prompts (5)**

- 1 - Record "Out-of-Office" greeting
- 2 - Hear "Out-of-Office" greeting
- 3 - Record "No Answer" greeting
- 4 - Hear "No Answer" greeting
- 5 - Record the user's name
- 6 - Hear the user's name prompt
- 7 - Activate "Out-of-Office" greeting
- 8 - Turn off "Out-of-Office" greeting
- 9 - Turn off "No Answer" message

- **Manage One Number Follow-Me (6)**

- 1 - Turn Follow Me on or off
- 2 - Listen to current configuration options

- 3 – Add a telephone number
- 4 – Edit a telephone number
- 5 – Delete a telephone number

- **Manage Deleted Messages (7)**

- 1 – Manage Deleted Voicemail
 - 1-Save current voicemail
 - 2-Forward message to extension
 - 3-Skip to next message
 - 4-Replay current message
 - 5-Reply to current message
 - 6-Play text in message body
 - 7-Permanently remove message
 - 8-Play envelope information
- 2 – Manage Deleted Faxes
 - 1-Save current fax
 - 2-Forward fax to extension
 - 3-Skip to next fax
 - 4-Receive fax (enter destination number followed by #)
 - 6-Play envelope information
 - 7-Delete current fax & play next
 - 1-Delete all with this subject
 - 2-Delete all from this sender
 - 8-Play envelope information
- 3 – Manage Deleted Email
 - 1-Save current email
 - 2-Forward message to extension
 - 3-Skip to next email
 - 4-Replay current email
 - 5-Reply to local email by voicemail
 - 6-Play text in email message
 - 7-Permanently remove this email
 - 8-Play envelope information
- 4 – Restore all messages
- 5 – Erase all messages

- **Personal Notification Options (8)**

- 1 – Set alert types
 - 1-Turn notifications off
 - 2-Email-based alerts
 - 3-Paper-based alerts
 - 4-Telephone-based alerts
 - 5-Pager carrier-based alerts
- 2 – Set alert reasons
 - 1-Voicemail arrives: 1-Any voicemail 2-Urgent only
 - 2-Faxes
 - 3-Set alert schedule
 - 1-Dial this person's extension
 - 2-Alert only during certain hours
 - 3-Set Start/End times

2.2.5.Access Company Directory (6)

- Enter an extension followed by # (1)
- Dial by name (2)

- 1 – Dial this person's extension
- 2 – Dial this person's home phone
- 3 – Dial this person's mobile phone

2.2.6. Initiate Office-wide Alert (7)

- Route the user's call to each consecutive extension with an Available status.

2.2.7. Access Mailbox Subfolders (8)

- Follow the prompts to access their custom subfolders, their Sent Items folder, or their Deleted Items folder.
- Press "0" to return to the user's Inbox.

2.2.8. Access Outlook Options (9)

- **Access Outlook Calendar (1)**
 - 1 - Hear today's meeting schedule
 - 2 - Hear meeting for another day (DD-MM-YY)
- **Out-of-Office Assistant Options (2)**
 - 1-Turn Out-of-Office Assistant on
 - 2-Turn Out-of-Office Assistant off

2.2.9. Managing Phone Calls

- **Using the toolbar**
 1. In the Number: field; type the phone number the user wants to call.
 2. Click the Make Call button next to the Number: field or press Enter.
- **Dial a recently dialed number**
 4. Click the arrow at the end of the Number: field drop-down list.
 5. Click a number from the list of numbers the user has recently dialed.
 6. Click the Make Call button next to the Number: field or press Enter.

Note: The user can also dial a recently dialed number by opening the Call History view and clicking the number they wish to call, or right-clicking the number and choosing Dial from the menu that appears.

- **Dial a number inside the organization**
 1. Click a directory tab.
 2. Do one of the following:
 - Double-click a name from the directory list.
 - Single-click any displayed phone number.
 - Right-click a person's name and choose one of the displayed "Dial..." entries from the menu that appears.
- **Answer a call**
 - If the user is not connected to another call, pick up their telephone handset.
 - If the user is connected to another call, click the "Pickup" button. The first call is placed on hold.
- **Place a call on hold**
 1. Click the call the user wants to put on hold, then click the Hold button, or right-click it and choose Hold.
 2. To reconnect to the call, click Hold again.
 3. To suppress hold music for the caller, click Mute before or after clicking Hold.

- **Forward the User's calls**

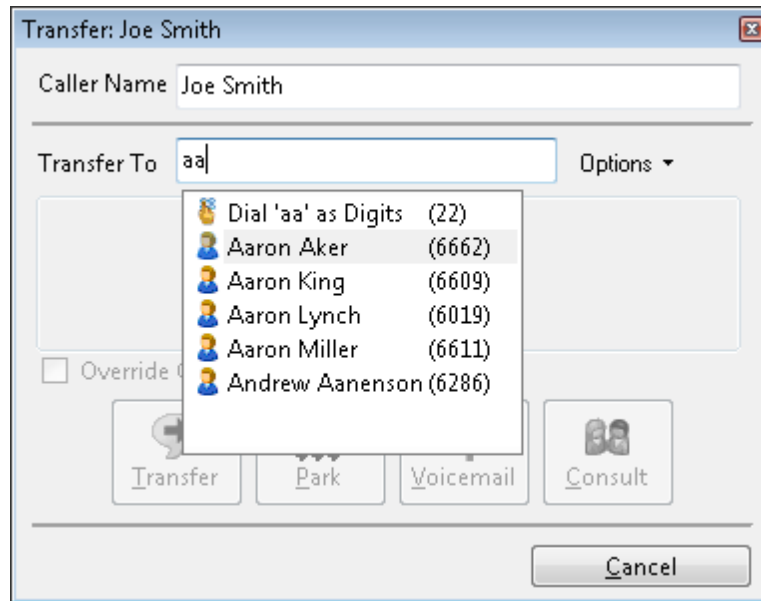
1. Click the My Status drop-down list.
2. Select Available, Forward from the list.
3. Click the Set status details link to the right of the My Status list. The Set Status box opens.
4. In the Forward Number: field; enter the remote phone number for forwarded calls.
5. Click OK.

- **Disconnect a call**

1. To disconnect a call with the user's handset, just hang up the telephone.
2. To disconnect a call with the client:
 - Highlight the call to disconnect.
 - Click the Disconnect button or right-click the call and choose Disconnect.

2.2.10.

Transfer and Park Calls



- **Transfer a call to another person**

4. Inform the caller of the transfer and on the Call Control toolbar click the Transfer button. The Transfer dialog box opens.
5. In the Transfer To: field, type all or part of the recipient's name or number. In the dropdown list that appears select "Dial [the User's entry] as Digits" to convert a text entry into numbers or select the appropriate contact name and associated extension or phone number.
6. Click the Transfer button or choose from the following transfer options:
 - **Park:** Place a call on hold in the receiver's My Interactions queue.
 - **Voicemail:** Direct the call to a receiver's voicemail.
 - **Consult:** Opens the Consult Call dialog box and allows the user to select the Consult button to speak to the transfer recipient while their caller stays on hold or the Caller button to speak to the caller without exiting the transfer operation, or the Transfer Now button if the recipient answers the phone and agrees to the transfer.

2.2.11.

Working Voicemail

- **Listen to the User's voicemail**

1. Open their email inbox.
2. Open the email with the attached voicemail.

***Note: The User can use either the Interaction Voicemail Player or their selected media player to playback the message, depending on the choice in the Voicemail Player Options dialog box.**

- **Pick up a call in voicemail**

1. If the call is not highlighted, click the call the user wants to pick up.
2. They can then click on the Pickup button or they can right-click on the call and choose Pickup.

2.2.12. Conferencing Option

- **Creating a conference call session**

1. Dial the number of a participant in the conference call, and then click the Hold button to put the call on hold. Repeat for each contributor.
2. Select one of the calls the user wants to conference and while holding down the mouse button, drag that call to another call in My Interactions and release. The user will see a new conference interaction.

- **Add someone to a conference session**

1. To add parties to a conference call, drag a connected call and drop it on the Conference item in the My Interactions list.

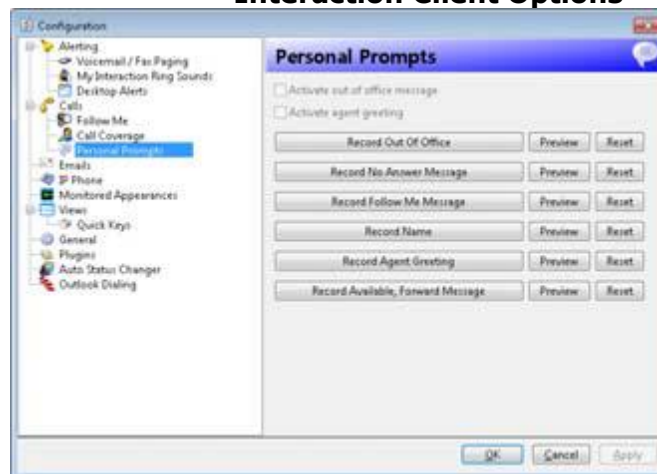
- **Using the Join feature to add individuals to the conference call**

1. Open the user or station queue the user is monitoring.
2. Select the call or conference call they want to join.
3. Click the Join button. They are now connected to the call (or conference call already in progress).

- **Disconnect someone from a conference call**

1. From the list of joined calls in the My Interactions list, choose the participant the user wants to disconnect.
2. Click the Disconnect button or right-click and choose Disconnect.

2.2.13. Interaction Client Options



- **Record the user's personal prompts**

1. Open the Options menu, click Configuration, expand the Calls node and click Personal Prompts.
2. In the Personal Prompts page, click the button of the prompt they want to record.
3. Pick up the call and record the prompt, then choose option 1 to end the recording.
4. To review a recorded prompt, click the Preview button.
5. To return a prompt to a generic recording, click the Reset button.

6. Click Apply to save their changes.

- **Set the user's status**

1. Click the arrow at the end of the My Status box. Or in the notification area of the user's taskbar (located at the bottom right side of their main window), right-click their Interaction Client status icon. Or in the Company Directory, right-click their name and choose Change User's Status.
2. Choose a status from the menu and, if applicable, click the OK button. View another person's status. Right-click a person's name in the Company Directory or other directory tab. Interaction Client .NET Edition lists the person's availability in the menu that appears.

****Note: The View Directory Status Columns Access Control right determines whether the user can view a user's status in the directory context menu.***

- **Set another person's status**

****Note: They need the Change Status Users Access Control right for a specific user to be able to change that user's status.***

1. Right-click the user's name in the Company Directory or other directory view.
2. Select Change User's Status from the menu that appears. The Set Status dialog box appears.
3. Select a status from the drop-down list and enter other applicable status information. Then click OK.

2.2.14.

Tips for the Advanced User

- Interaction functions**

Shortcut	Function	Shortcut	Function
Ctrl+B	Callback	Ctrl+D	Disconnect
Ctrl+P	Pickup	Ctrl+J	Join
Ctrl+H	Hold	Ctrl+L	Listen In
Ctrl+U	Mute	Ctrl+R	Record
Ctrl+T	Transfer	Ctrl+E	Pause
Ctrl+K	Park Orbit	Ctrl+I	Private
Ctrl+M	Voicemail	Ctrl+N	Assistance
Ctrl+Shift +P	Properties	Ctrl+Shift +R	Remove from Queue

- Menu Shortcuts**

Shortcut	Function
Alt+F+O	Logout
Alt+F+S	Change Station
Alt+F+C	Close (hide)
Alt+F+X	Exit
Alt+V+A	Active Camps
Alt+O+R	Rules
Alt+O+C	Configuration

- More Keyboard Tips**

- Press WinKey+C to pop the client window, regardless of the application currently running in the foreground. If an interaction is in the user's queue, the focus is on My Interactions. If a call is not selected, the focus goes to the Number: field, allowing they to make a call quickly.

***Note: The Winkey is the Windows logo key typically located between the Ctrl and Alt keys.**

- Press F2 to give focus to My Interactions and press F3 to give focus to the Company Directory.
- When a view in a docked area has focus, the user can move between tabs within that zone with their left and right arrow keys. If they want to move to a different docked area, use Alt+[left, right, up, or down] arrow key.
- A list of recent calls is available from the Number: drop-down list. Eliminate unwanted numbers from this list by selecting an entry and pressing Delete.

***Note: These shortcuts work only if an interaction or view is selected before the user performs the action by clicking with the mouse or navigating with the Tab and arrow keys on the keyboard. A view must have focus before they use the shortcut keys. The view with focus is indicated by a highlighted tab with its name is in bold type. For shortcuts to work properly, hold down the Ctrl or Alt key while pressing and releasing the second and then, if needed, the third key.**

2.3. Reports

2.3.1.ICS Report Listing

AGENT AVAILABILITY REPORTS	
Report Name	Report Description
(Supervisor) Agent Availability Detail	This report is sorted by IC user IDs and shows each time the user's status changed throughout the selected dates and times, and how long they were in the status each time it changed. It also provides total time they were logged in, available for ACD calls, in a do not disturb status and After Call Work status.
(Supervisor) Agent Availability Summary	Shows how long users were in an Available state to take calls, and each user's status while they were unavailable. Provides a general overview of each state entered for each day and the duration of these states. Shows time logged into Interaction Client, Time in ACD / Available status; time in Non-ACD statuses (available for non-ACD calls, such as Available Follow-Me and Available Forward); time in statuses marked as Do Not Disturb statuses; time in statuses marked as After Call Work (such as Follow-up). This report is sorted by IC user IDs.

AGENT PERFORMANCE REPORTS	
Report Name	Report Description
Agent Performance Detail for Queue-	This report is for supervisors who want to analyze CSRs and their interaction activity at more of a detail level. The Supervisor can select CSRs individually or by queue. This report is sorted alphabetically by selected CSR, then by date, and then showing a line of activity for each of the CSR's queues for each date. It also includes a summary line for all of the CSR's queues for each selected day, and a grand total summary line for the CSR.
Agent Performance Summary for Queue-	This report is for supervisors who want to analyze CSRs and their interaction activity at a summary level. The Supervisor can select CSRs individually or by queue. This report is sorted alphabetically by selected CSR and shows one summary line of activity for each CSR, combining all the days specified in the report, and combining all queues for each CSR.

AGENT QUEUE ACTIVATION REPORTS

Report Name	Report Description
Agent Activation by Workgroup	This report lists each workgroup queue and then all of the CSRs who logged in or out of that queue during the given period. CSRs with the appropriate Access Control permissions can activate or deactivate themselves from a particular queue. Likewise, administrators and supervisors with the appropriate Access Control permissions in Interaction Administrator can activate or deactivate CSRs from queue. The report indicates who did the activating/deactivating of the CSR.
Agent Availability with Activation	Similar to the Supervisor CSR Availability Detail report, this report lists each CSR and the status changes for that CSR during the given period. However, the end of this report includes the CSR Activation by Workgroup report (described above), to indicate changes in CSR activation status in queues during that period.
Queue Activation by Agent	This report lists only each CSR who was activated or deactivated in a queue during the given period, and then all of the activation status changes for that CSR's queue(s). This is similar to the CSR Activation by Workgroup report described above except it is organized by CSR name with queue activation status changes listed together for that CSR.

CALL SUPERVISOR REPORTS

Report Name	Report Description
(Graph) Area Code	This graph lists all outbound calls by area code. The Supervisor can specify all area codes, a range of area codes, or a single area code. The Area Code Summary report provides managers with a picture of regional calling patterns. By using this report, management can determine the distribution of callers from various regions of the country and decide the best way to handle callers. They are not able to specify users or workgroups in this report – it shows ALL calls to the area codes that they specify.
Area Code / Exchange Summary	This report pinpoints exact exchanges that are dialed. This report can assist with productivity and management analysis.

(Graph) Incoming Calls by User	Shows the number of inbound calls associated with each user specified in the range. It includes calls delivered through a workgroup Q and calls dialed or transferred directly to the User. This report includes abandoned calls – call was alerting to the CSR and caller hung up before CSR answered. This report also includes missed calls, so it is NOT an indication of calls handled. This report does not include system-owned calls.
(Graph) Outgoing Calls by User	This graph shows the number of outbound calls associated with each user specified in the range. Use the Calls Outbound Line Group by Hour graph to see the number of calls on each line.
(Supervisor) Caller ID Detail	Information can be established from Caller ID reports such as customer calling patterns, time to service the account, and level of service to the customer. The Caller ID Detail Report is best used by managers who want to see how accounts are serviced and determine profitability of the account. Shows inbound caller ID, date and time of the call, the End User connected to the call, their extension, any hold time, and call duration.
(Supervisor) Caller ID Summary	The Caller ID Summary summarizes the number of calls received into the Interaction Center from a specific Caller ID number. Each line is reflected with the number of calls received from a specific ID and the call durations.
(Supervisor) Caller ID Summary by Date	The Caller ID Summary by Date summarizes the number of calls received into the Interaction Center from a specific Caller ID number. Each date is reflected with the number of calls received and the call durations.
(Supervisor) User Call Summary	This report displays a summary of all calls for the specified IC users for each day in the given range. The report is designed to give a summary report of the user's call volume. It shows counts for Incoming, Outgoing, Unknown, and Total, and shows total Duration and Average Duration of each type. It does not distinguish between Incoming ACD and Incoming Direct calls.
(Supervisor) User Call Detail	The User Call Detail report displays all calls for one or more users for a given time period. The report is designed to give each user their own report of calls. A manager can use the User Call Detail Report to audit a user's productivity. System administrators may choose to use the User Call Detail Report to bill users and departments for their long distance calls.

(Supervisor) Caller ID Summary by User	The Caller ID Summary by User displays summary information by User, then by Caller ID. Each user is listed with the total number of calls and average duration for each date.
(Supervisor) User Outbound Call Summary by Number Dialed	Lists outbound numbers for a specific time period and the users who called these numbers. This User Summary report is beneficial for professional services and environments with specific accounts. Each user's calls to specific numbers are summarized. The report can be used by the user or their supervisor to evaluate account and service information.
Calls Processed by User Comparison	A tool for supervisors to evaluate and compare user call volumes. Shows the number of calls processed (inbound and outbound) by each user during a given time period. Does not indicate number of inbound vs. number of outbound calls; just provides a total for both directions. To see inbound and outbound calls separately, run Incoming Calls by User and Outbound Calls by User reports. Enter each user or a range of users; not workgroup names.
Dialed Number Detail	Shows all outbound calls sorted by dialed number during a specific time period. The dialed number report shows all outbound calls sorted by dialed number. Managers and supervisors can use this report to find all outbound calls and who is servicing specific accounts.
Hourly Call Summary by Extension	Lists the number of calls processed by each extension during each hour of a specific time period. Analyzes call volumes for a given time period. Each hour is broken out with numbers of calls processed by each extension during each hour.
International Remote Number Logical Component One Summary	Shows the area codes dialed out from the system, and the duration of calls to each area code within a particular country. This is sorted by country code and then area code. The "Logical Component One" refers to a subdivision of the called number that is normally used for the area code (XXX-999-9999) in the United States but may have other uses in some other countries.
International Remote Number Logical Component Two Summary	Shows the exchanges dialed out from the system, and the duration of calls to those exchanges within the specified area codes. This is sorted by country code and then by exchange. The "Logical Component Two" refers to a subdivision of the called number that is normally used for the exchange (999-XXX-9999) in the United States but

	may have other uses in some other countries.
(Supervisor) Number Search	The Number Search Report is a tool for managers and system administrators who wish to track down the callers of specific numbers.
Station ID Detail	The Station ID Detail report shows the Station ID information by date for a selected range of stations. This report information includes call duration, end user, and hold time. The Supervisor can use Station ID reports to monitor call activity placed or received from non-User assigned phones or for a phone, including time when a User is not logged into the phone or Interaction Client software. This report shows if the call was inbound or outbound, but does NOT show specific caller ID, nor does it indicate whether the call was internal or external. The station ID is the actual extension number or name that we associate with the MAC address of the phone. The extension is usually the station ID with a 1 in front of it.
Station ID Summary	The Station ID Summary report shows the Station ID summary information by date for a selected range of stations, including call duration, call count, and average duration.

CALL REPORTS

Report Name	Report Description
Caller ID Detail for Current User	This report shows details of calls received by the current user to each identified external telephone number. If the external number did not include caller ID information, it is listed under the External Call group at the end of the report.
Caller ID Summary for Current User	This report shows summary of information on inbound calls the current IC user received from each identified external telephone number. If the external number did not include caller ID information, its Caller ID is listed as External Call.
Number Search for Current User	This report allows the Supervisor to search for numbers dialed or calls received from a specific phone number for the current user. This report is sorted by the phone numbers searched for and retrieved.

User Call Detail for Current User	The User Call Detail Report displays all calls for the current user running the report for a given time period. The report is designed to give the user a report of each his or her calls. By default, all interaction Client users have access to this report. System administrators may choose to use the User Call Detail Report to bill users and departments for their long distance calls.
User Call Summary for Current User	The User Call Summary for Current User (labeled as User Summary by Date) report displays a summary of all calls for the current IC user on each day in the given range. The report is designed to give a summary report of the individual users call volume.
User Outbound Call Summary by Number Dialed for Current User	This report lists dialed outbound numbers called by the current user for a specific time. This User Outbound Summary report can help individual users keep track of all dialed numbers. Each user's calls to specific numbers are summarized.

DNIS REPORTS

Report Name	Report Description
Statistics Group DNIS Daily	This report summarizes a day's queue activity by DNIS, including percentages of calls answered and abandoned within service levels, for specified statistics groups (IF statistics groups are configured. Talk with IC Installation Engineer). This is an interval report and will report statistics up to the end of the previous interval. For example, if it is currently 11:15 am and the Supervisor runs the report for today, it will show data up until 11:00 am.
DNIS Detail	The Statistics Group DNIS Report displays a detail by day for the specified DNIS or DNIS range. The report is designed to give a summary report of the day's queue activity by DNIS. This report displays the number of ACD calls, number of abandoned calls, and percentages on abandoned and answered within the first service level as configured in Interaction Administrator. This report has Flexible Fields, allowing the Supervisor to substitute certain columns of data for other data (see the Reporting on-line help for details).

Warning!! DNIS statistics collection will significantly increase data collection. For this reason, the DNIS server parameter, QueuePeriodStatisticsGenDNISData, default value is No. The

Supervisor must set this server parameter in Interaction Administrator to Yes if they want to collect the DNIS data.

QUEUE REPORTS	
Report Name	Report Description
Abandoned Call Profile	This graph plots the number of abandoned calls during each interval of a specified date range. This graph sorts by queue name, shows data by interval (typically half-hour), combines all days in the range together, and includes a summary graph page. So, the Supervisor can see trends by intervals throughout the day, but not able to see trends among the days of the week.
Answered Call Profile	This graph plots The number of calls that were answered in an ACD queue per reporting interval of the specified date range. This graph sorts by queue name, shows data by interval (typically half-hour), combines all days in the range together, and includes a summary graph.
Profile of Average Wait to Answer	This graph plots the average wait to answer time of calls during each interval of a specified date range. This graph sorts by queue name, shows data by interval (typically half-hour), combines all days in the range together, and includes a summary graph page.
Profile of Calls Abandoned in the 1st Service Level	This graph plots the number of abandoned calls in the 1st service level during each specified interval of a specified date range. The service level tells managers the percentage of calls answered within the goal of X seconds. Supervisors can set the goal to 10 seconds, 60 seconds, or more depending on the environment settings. This graph sorts abandoned calls in the 1st service level by queue name and includes a summary graph page named Grand Total Sum All Queues.
Profile of Calls Answered in the 1st Service Level	This graph plots the number of answered calls in the 1st service level during each interval of a

	specified date range. The service level tells managers the percentage of calls answered within the goal of X seconds. Supervisors can set the goal to 10 seconds, 60 seconds, or more depending on the environment settings. This graph sorts answered calls in the 1st service level by queue name and includes a summary graph page named Grand Total Sum All Queues.
Profile of Calls Entering ACD	This report shows the number of calls entering an ACD queue during each interval of the specified date range. An entered call occurs when a call enters a queue, regardless if it is answered, goes to voice mail, etc. This report also provides a graph that sorts the number of ACD calls entering a queue by queue name and includes a summary graph page named Grand Total Sum ALL Queues – combined. This is an interval report, so it shows calls broken down by intervals. If the Supervisor runs it over multiple days, they can see which interval (half-hour) of the day tends to be the busiest and the slowest, etc... This can help with staffing.
Profile of Maximum Wait to Answer	This graph plots the maximum wait to answer time of calls during each interval of the specified date range. This graph sorts the maximum wait to answer time by queue name, by reporting interval, showing interval statistics and a graph for each selected queue. It includes a summary graph page for all queues combined, and a summary line of max wait time for all queues combined.
Queue Period Statistics (QPS) Abandon Report	The QPS Abandon report displays the percentages of all ACD interactions abandoned at the various service level thresholds. The service level thresholds are determined by their settings in Interaction Administrator. This report includes interactions answered, interactions entering the queue, and the percentage of interactions abandoned at each service level threshold.

Queue Period Statistics (QPS) Abandon Report (Accumulative Percentage)	The QPS Abandon Report (Accumulative Percentage) displays the accumulated percentages of all ACD interactions abandoned at the various service level thresholds. The service level thresholds are determined by the Supervisor's settings in Interaction Administrator. This report includes interactions answered, interactions entering the queue, and the accumulated percentage of interactions abandoned at each service level threshold.
Queue Period Statistics (QPS) Response Report	The QPS Response report displays the percentages of all ACD interactions answered at the various service level thresholds. The service level thresholds are determined by the Supervisor's settings in Interaction Administrator. This report includes interactions answered, interactions entering the queue, and the percentage of interactions answered at each service level threshold.
Queue Period Statistics (QPS) Response Report (Accumulative Percentage)	The QPS Abandon Report (Accumulative Percentage) displays the accumulated percentages of all ACD interactions abandoned at the various service level thresholds. The service level thresholds are determined by their settings in Interaction Administrator. This report includes interactions answered, interactions entering the queue, and the accumulated percentage of interactions abandoned at each service level threshold.
Distribution Queue Performance (Date by Queue)	This report allows they want to see a detailed view of queue activity with a breakdown by date. It includes such information as interactions answered, total talk time, average talk times, average wait time. It also shows information on ACW time and Abandons.
Distribution Queue Performance (Date by Queue by Interaction Type)	This report allows the Supervisor to see a detailed view of queue activity grouped by date. It includes such information as interactions answered, total talk time, average talk times, average wait time. It also shows information on ACW time and Abandons.
Distribution Queue Performance (Queue by Date)	This report is broken down by Q, with a one-line summary for each date in the report range. It does not provide a total line for each queue; instead it provides a total line for all of the selected Queues combined for all of the days in the report range.
Distribution Queue Performance (Queue by Date by Interaction Type)	This report allows the Supervisor to see a detailed view of queue activity with a breakdown by date and interaction. It includes such information as

	interactions answered, total talk time, average talk times, average wait time. It also shows information on ACW time and Abandons.
Distribution Queue Performance (Queue by Interaction Type)	This report allows them to see a detailed view of queue activity grouped by interaction type. It includes such information as interactions answered, total talk time, average talk times, average wait time. It also shows information on ACW time and Abandons.
Distribution Queue Performance (Queue by Date by Interval) *	This report allows the Supervisor wants to see a somewhat detail view of queue activity grouped by date. This report also allows a supervisor to compare intervals for a particular day on a particular queue. It includes such information as interactions answered, average talk time, total talk time, max wait time, average speed of answer, svc level 1. It also shows information on ACW time and Abandons. Broken down by Q, by date, by interval (e.g. every 30 or 60 min, depending on interval configured) with a 1-line summary at top of each date, and a total line for each Q for all the days. Next to last page is 1 summary line for Site. Final page is 1 summary line for Grand Total.

IVR REPORTS

Report Name	Report Description
IVR Summary by Date	Displays an IVR summary report for a level, which shows IVR level name, interactions, duration, average duration, percent of calls by IVR level name, repeated calls, and percent of calls repeated.
IVR Audit Report	Displays interaction ID, date, time, sequence number, and events 1, 2, and 3.
IVR Breakdown	Displays an IVR breakdown report by date, which shows IVR level name, interactions, duration, average duration, and percent of calls by IVR level name, repeated calls, and percent of calls repeated.
IVR Exit Path	Displays date, interaction, path duration, average duration, and repeated interactions.
IVR Summary Abandoned Report	Displays an IVR summary report by date, which shows level name, interactions, aborted interactions, average aborted duration, percent

	aborted, repeated abortions, and percent repeated.
IVR Summary	Displays an IVR summary report for a level (default = 4), which shows IVR level name, interactions, duration, average duration, percent of calls by IVR level name, repeated calls, and percent of calls repeated.

AGENT REPORTS	
Report Name	Report Description
Agent Availability Detail	This report shows how long the Supervisor was in an Available state to take calls, and their status while they were unavailable.
Agent Availability Summary	This report shows how long the CSRs were in an Available state to take calls, and their status while they were as unavailable.

INTERACTION RECORDER REPORTS	
Report Name	Report Description
Interaction Recorder Scoring Detail	This report provides detailed information about the scoring of each recording scored via an Interaction Recorder questionnaire. The report is grouped by the Title and Date/Time of each recording, and under that the details of each IC User's performance on that recording are displayed. Each question group and specific questions from the questionnaire are shown along with the scorer's answer and score for each question.
Interaction Recorder Questionnaire Detail	This report provides detailed information about each questionnaire included in the range. It enables supervisors and managers to analyze all of the questions, score ranges, types of questions, weights and other possible values available in a questionnaire.
Interaction Recorder Scoring Summary	This report summarizes the questionnaire scores for each Interaction Recorder questionnaire in the specified range. It lists a summary line for each scored recording under each questionnaire name included in the report. Recordings that have not been scored will not appear in the list. The summary line provides an overview of how an CSR performed on each recorded, scored interaction in

	the range.
Interaction Recorder Scoring User Summary	This report summarizes the questionnaire scores for each IC user and Interaction Recorder questionnaire in the specified range. It lists a summary line for each scored recording under each user name included in the report. Recordings that have not been scored will not appear in the list. The summary line provides an overview of how an CSR performed on each recorded, scored interaction in the range.
Deleted Recording Audit by Date	The Deleted Recording Audit by Date report is an Interaction Recorder report that displays deleted recordings by Date and Time the Recording was deleted, and then by User ID.
Deleted Recording Audit by User	The Deleted Recording Audit by User report is an Interaction Recorder report that displays deleted recordings by User and then by Date/Time the recording was deleted.
Recorder Scoring Summary for Admin	This report summarizes the questionnaire scores for each Interaction Recorder questionnaire in the specified range. It lists a summary line for each scored recording under each questionnaire name listed by IC Scorer (reviewer). Recordings that have not been scored will not appear in the list. The summary line provides an overview of how an CSR performed on each recorded, scored interaction in the range.
Recorder Scoring User Summary for Admin	This report summarizes the questionnaire scores for each IC user and Interaction Recorder questionnaire in the specified range. It lists a summary line for each scored recording under each IC User name included in the first column of the report, and is sorted by that name. Recordings that have not been scored will not appear in the list. The summary line provides an overview of how an CSR performed on each recorded, scored interaction in the range.

INTERACTION TRACKER REPORTS	
Report Name	Report Description
Tracker Individual Detail Report	Displays an individual detail report.
Tracker Individual Summary	Displays an individual summary report.
Tracker Interaction Segment Detail for Admin Report	Tracker Interaction segment detail report.

Tracker Interaction Segment Detail for Current User	Tracker Interaction segment detail report for current user.
Tracker Interaction Segment Detail by IC User	Tracker Interaction segment detail report by IC user.
Tracker Interaction Segment Summary for Admin	Tracker Interaction segment summary report for all users.
Tracker Interaction Segment Summary for Current User	Tracker Interaction segment summary report for current user.
Tracker Interaction Segment Summary by IC User	Tracker Interaction segment summary report by IC user.
Tracker Location Detail	Displays a location detail report.
Tracker Location Summary	Displays a location summary report.
Tracker Organization Details	Displays an organization detail report.
Tracker Organization Summary	Displays an organization summary report.
Voicemails Tracker Contacts (Search by Contact)	Displays the date and time, and durations of voice mails left by a Tracker contact to the different IC users.
Voicemails Tracker Contacts (Search by IC User)	Displays the date and time, and durations of voice mails left by Tracker Contacts to the different IC users.

INTERACTION FEEDBACK REPORTS

Report Name	Report Description
Satisfaction Trends (Line Graph)	The Survey Satisfaction Trends report shows the satisfaction trend for an CSR over time, by survey. Displayed in a line graph.
Survey Scoring Detail	The Survey Scoring Detail report shows the average survey score for CSRs during a date and time range. The report also shows survey detail by user, including survey scores, percentile, and score and weight by question.
Survey Scoring Summary	The Survey Scoring Summary report shows the average survey score for CSRs during a date and time range.
Survey vs. Quality Scores	This report compares survey and quality scores from Interaction Recorder for a given CSR.

INTERACTION OPTIMIZER REPORTS

Report Name	Report Description
Individual Schedule Detail	Shows the detail of the Interaction Optimizer published schedule for an individual.
Individual Schedule Summary	Shows the duration of each scheduled activity in the Interaction Optimizer published schedule for an individual.
Schedule (List)	Shows start time and end time for every activity on the Interaction Optimizer schedule of users.
Schedule (Graph)	Shows a graph, Interaction Optimizer scheduled activities on intervals of 15 minutes for specified users.
Schedule (Text based)	Shows in a text based graph (can be printed on color or black-and-white printers), Interaction Optimizer scheduled activities on intervals of 15 minutes for specified users.
Adherence Detail by User/Date	Shows user exceptions to activities and durations that did not adhere to the published Interaction Optimizer schedule.
Adherence Detail by Date/User	Shows the exceptions to activities and durations for different dates of a user on the Interaction Optimizer published schedule.
Adherence Summary by User/Date	Shows duration and total exceptions for users in the Interaction Optimizer published schedule, by date.
Adherence Summary by Date/User	Shows duration and total of exceptions for different dates in the Interaction Optimizer published schedule, by users.

LINE GROUP REPORTS

Report Name	Report Description
Calls Entered Line Group by Hour	This graph shows the number of inbound and outbound calls attempted on each line for every hour of a specified day. This graph can be used to evaluate calling volumes throughout the day on each line. Each line's call volume is plotted for each hour to allow system administrators to see line traffic at a glance. Call attempts are evaluated versus actual connected calls to give a true picture of line activity.

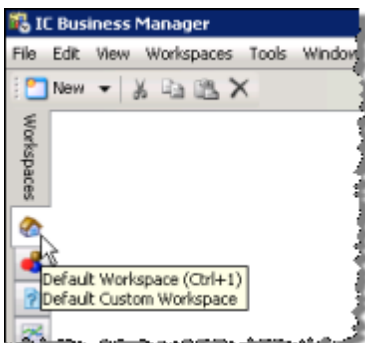
Calls Inbound Entered Line Group by Hour	This graph shows the number of inbound call attempts per hour for each line during an interval the Supervisor specify. This includes all inbound calls that reached a Connected state (i.e., connected to the IC server, not necessarily Client_Connected where an CSR answered a call).
Calls Outbound Blocked Line Group by Hour	This graph shows all outbound blocked line group calls by hour. This graph sorts the outbound calls by blocked line group name.
Calls Outbound Line Group by Hour	This graph shows the number of outbound call attempts per hour for each line (LineID), during an interval the Supervisor specifies. Outbound call attempts include all calls, including wrong or invalid numbers, busy calls, etc.)
Erlang Study	Evaluates the number of lines required to handle line traffic at half-hour intervals. An advanced report for system administrators to evaluate lines required to accommodate line traffic. Simply defined, an Erlang is the total line usage divided by the number of seconds available on one line in one hour (e.g., One Erlang is equal to one full hour of conversation). The Erlang can be used in an Erlang calculation to help determine the number of lines necessary to handle the call activity.
Line Group All Trunks Busy for Interval by Day	This report shows all intervals a report line group had when all lines were busy. Use this report to evaluate line traffic distribution and the need for line resources.
Line Group All Trunks Busy for Interval by Grade of Service	This report shows all intervals during which a report line group had all lines busy, and the line group had a grade of service less than the grade of service report parameter value entered during runtime. Use this report to evaluate line traffic distribution and the need for line resources.
Line Group Identification	This report shows the line group membership and the line configuration information to assist configuration management and problem resolution.
Line Group Least Used Trunks by Day	This report shows the least used lines for each reporting line group for a specified day.
Percent All Lines Busy by Hour	This graph plots report line groups when all lines were busy during the hours in the specified date and time range. Used to evaluate line traffic distribution and the need for line resources.
Percent Line Group Busy by Hour	This graph plots the percent of report line groups that were busy by hour during the hours included in

	the specified date and time range. Use this graph to evaluate line traffic distribution and the need for line resources.
Line Activity by Hour	This report evaluates call activity on the lines in a line group on an hourly basis. It shows LineID, start time, duration, utilization, and out of service time.
Line Activity Summary by Day	This report compares day to day line activity in a summary. This report shows the call activity on the configured lines in a line group across several days.
Line Activity Summary by Line	This report evaluates line activity for a day. This report shows the call activity for all lines in the specified range of line groups for a specified time and date range.
Line Group Activity Summary by Day	This report shows the daily summary of line group activity.
Line Group Activity Summary by Line	This report evaluates the line group activity for a day, showing call activity on the configured line groups across several days.

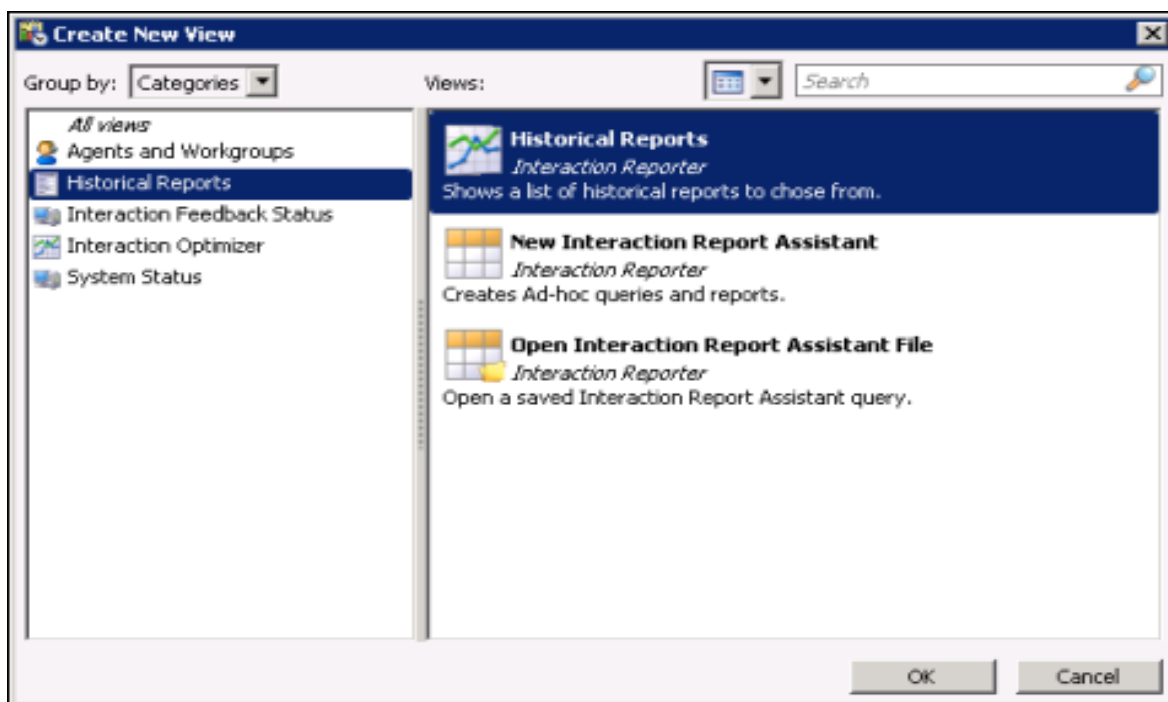
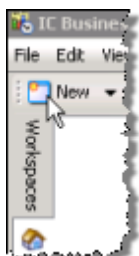
2.3.2.Creating Reports

- **Starting the Interaction Report Assistant**

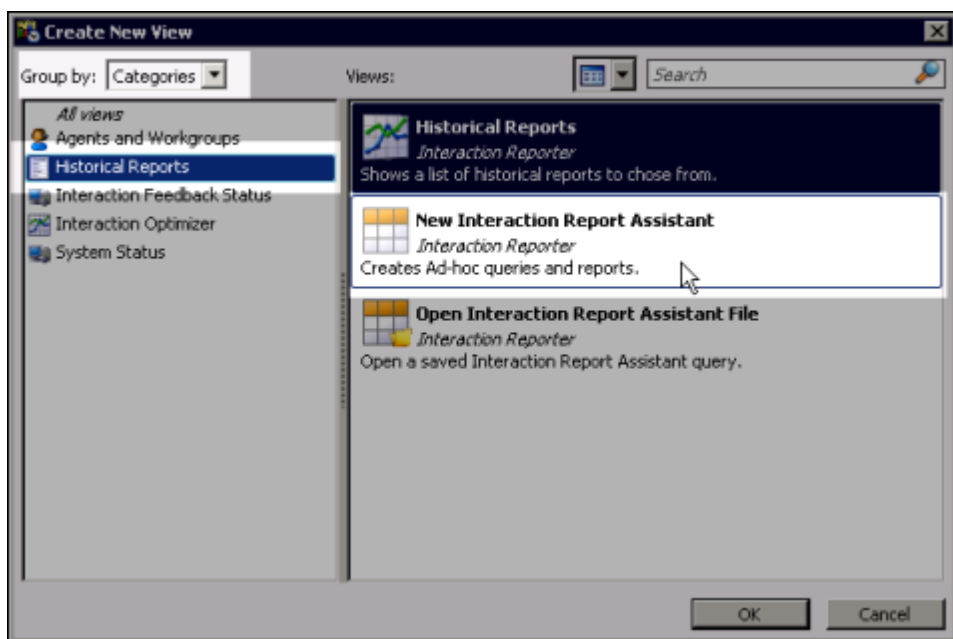
1. In IC Business Manager, click the Default Workspace module tab. The Create New View window will be displayed.



2. In the Group by drop-down, select Categories, and in the left pane select Historical Reports.



3. In the right pane, select New Interaction Report Assistant, and click OK.
4. In the right pane, select New Interaction Report Assistant, and click OK. Then the Interaction Report Assistant wizard is started.



- **Creating Queries and Reports**

Here's how to use Interaction Report Assistant to create queries and reports.

On the Welcome to the Interaction Report Assistant screen, click Next. The Package and layout dialog is displayed.

The screenshot shows a window titled "Interaction Report Assistant" with a sub-header "Package and layout" and the instruction "Choose the data and layout you want for your report." The window is divided into two main sections: "Data" and "Layout".

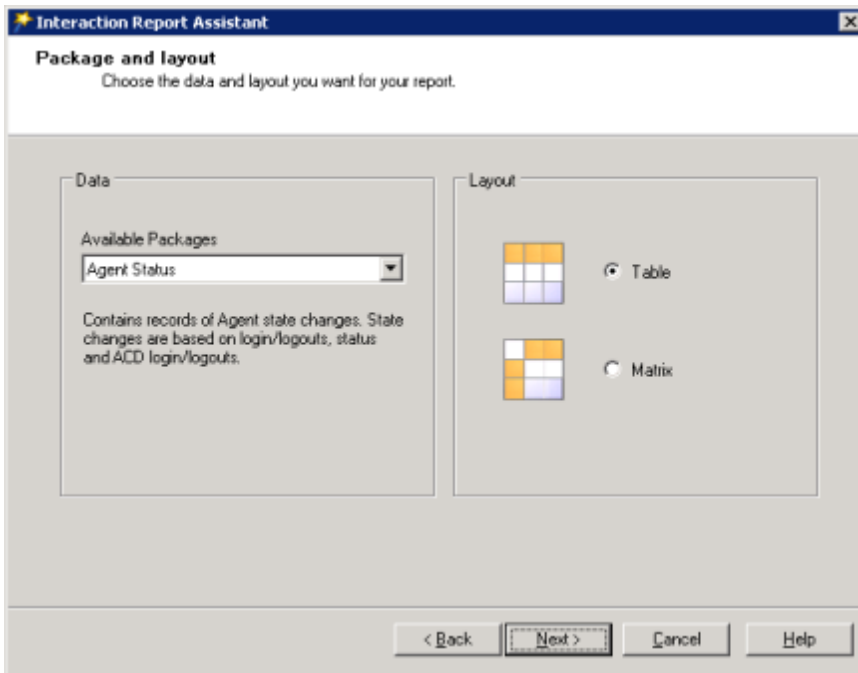
Data Section: Contains a dropdown menu labeled "Available Packages" with "Agent Status" selected. Below the dropdown, a description reads: "Contains records of Agent state changes. State changes are based on login/logouts, status and ACD login/logouts."

Layout Section: Contains two radio button options. The first is "Table", accompanied by a 3x3 grid icon with orange and white squares. The second is "Matrix", accompanied by a 3x3 grid icon with orange and blue squares. The "Table" option is selected.

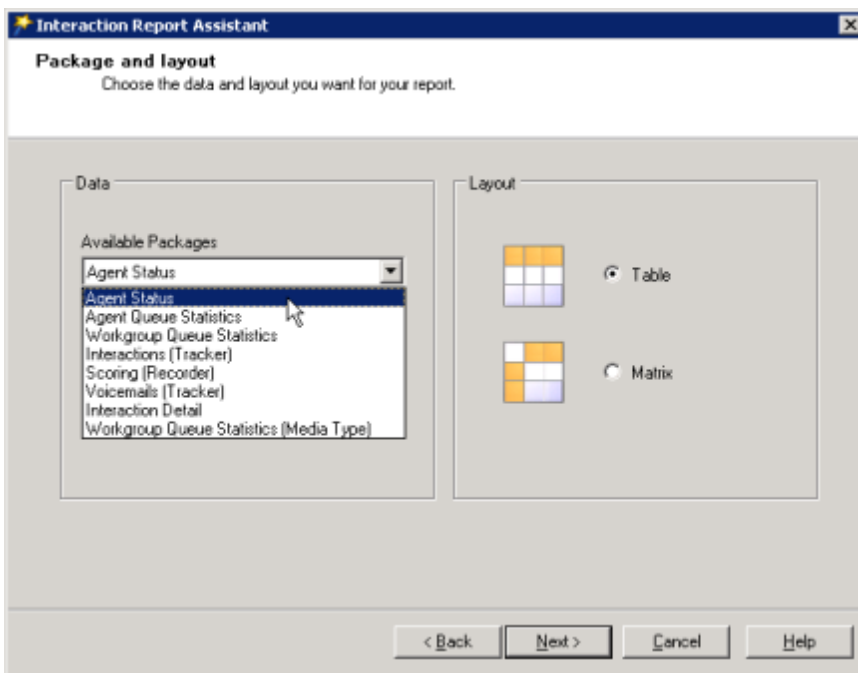
At the bottom of the window, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

- **Designing a report**

Interaction Report Assistant wizard guides the user through designing and generating their specialized report.



1. Choosing a data package: When they design their report, first select the package that contains the Data records they want to base their report on, and then select the report Layout—Table or Matrix.



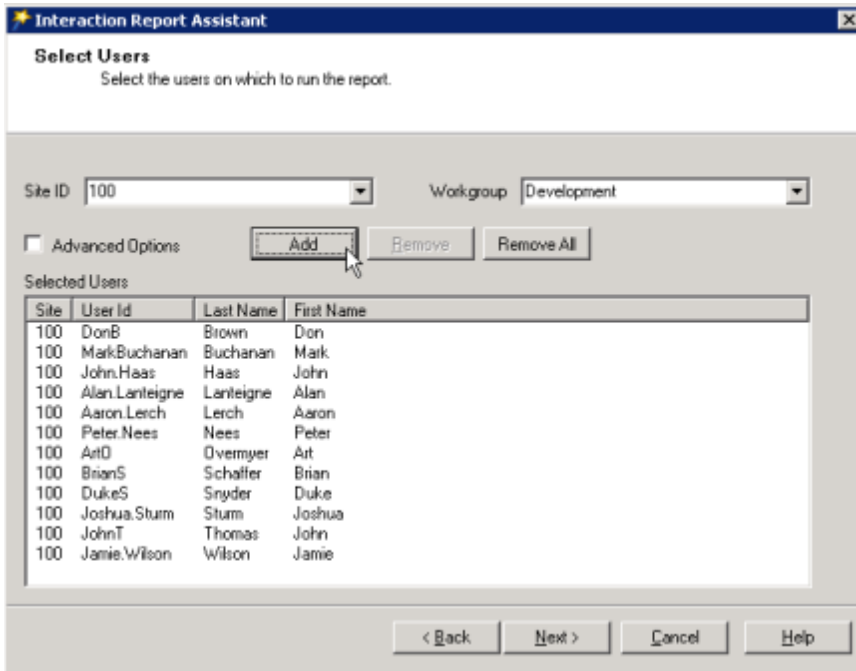
2. Choosing report fields: Next, based on the available fields for the package selected, add the columns or rows to display the data in their custom report.

3. Table Layout: Select fields for columns that will appear in their report.

4. Table Summary fields: They can summarize fields in Table reports. For more information, see —Grouping data later in this document.
5. Matrix design: Select fields for columns and rows that will appear in their report.

6. Selecting Users: After designing their report layout, the Supervisor will select users for which to run their report on. Select users from a workgroup or select specific users.

7. Selecting Users in a Workgroup: If the Supervisor's package is based on User data, the following dialog is displayed. Select users in a workgroup by choosing a Site ID and Workgroup from the drop-down boxes, and clicking Add to display the users in the Selected Users list box. If they want multiple users from a workgroup but not all users, it might be easier to add a workgroup and individually remove the users they do not want to report on.



Interaction Report Assistant

Select Users
Select the users on which to run the report.

Site ID: 100 Workgroup: Development

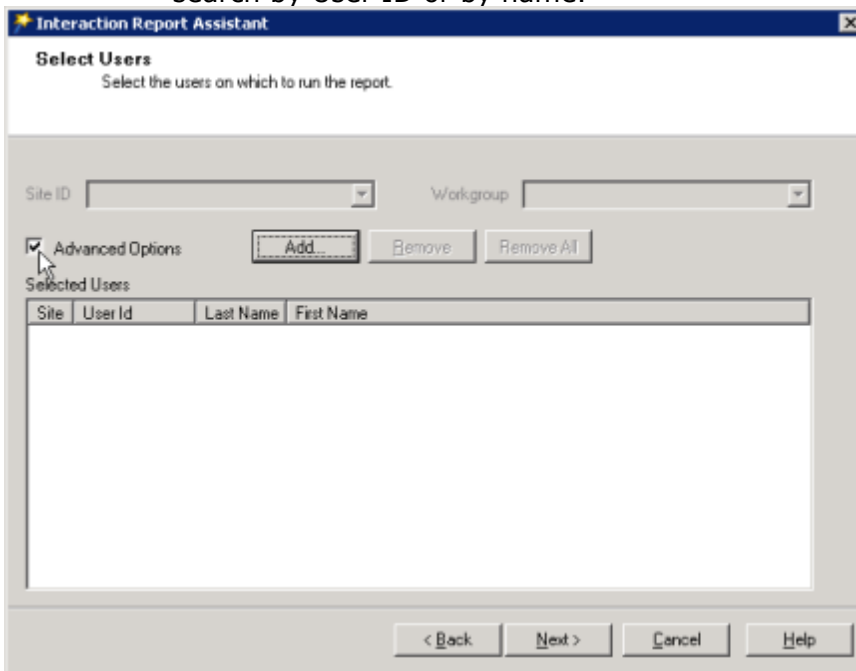
☐ Advanced Options **Add** **Remove** **Remove All**

Selected Users

Site	User Id	Last Name	First Name
100	DonB	Brown	Don
100	MarkB	Buchanan	Mark
100	JohnH	Haas	John
100	AlanL	Lanteigne	Alan
100	AaronL	Lerch	Aaron
100	PeterN	Nees	Peter
100	ArtO	Overmyer	Art
100	BrianS	Schaffer	Brian
100	DukeS	Snyder	Duke
100	JoshuaS	Sturm	Joshua
100	JohnT	Thomas	John
100	JamieW	Wilson	Jamie

< Back Next > Cancel Help

8. Selecting specific users: If a user is not in a workgroup, they can select Advanced Options to search by User ID or by name.



Interaction Report Assistant

Select Users
Select the users on which to run the report.

Site ID: Workgroup:

☒ Advanced Options **Add** **Remove** **Remove All**

Selected Users

Site	User Id	Last Name	First Name
------	---------	-----------	------------

< Back Next > Cancel Help

9. After selecting Advanced Options, click Add. The Advanced User Search dialog is displayed.

13. Filtering their data: Use the Filters dialog to refine the data to display in their report. First, select a filter from the Available Filters box. Select the data to be displayed in their report from the options displayed for the filter they have chosen.

Interaction Report Assistant

Filters
Select a subset of data to display considering the available filters.

Available Filters:

- ☒ Date

Today [dropdown] 4/13/2007 [dropdown]

☐ Time range 12:00:00 AM [dropdown] 11:59:59 PM [dropdown]

< Back Next > Cancel Help

14. Grouping data: For a Table layout report, they can choose to group the information. When they select a Group by box, the report will be sorted by the Friendly Name field. If the field is numeric, they can summarize the data by Average, Count, or Sum using the Summary Type drop-down box.

Interaction Report Assistant

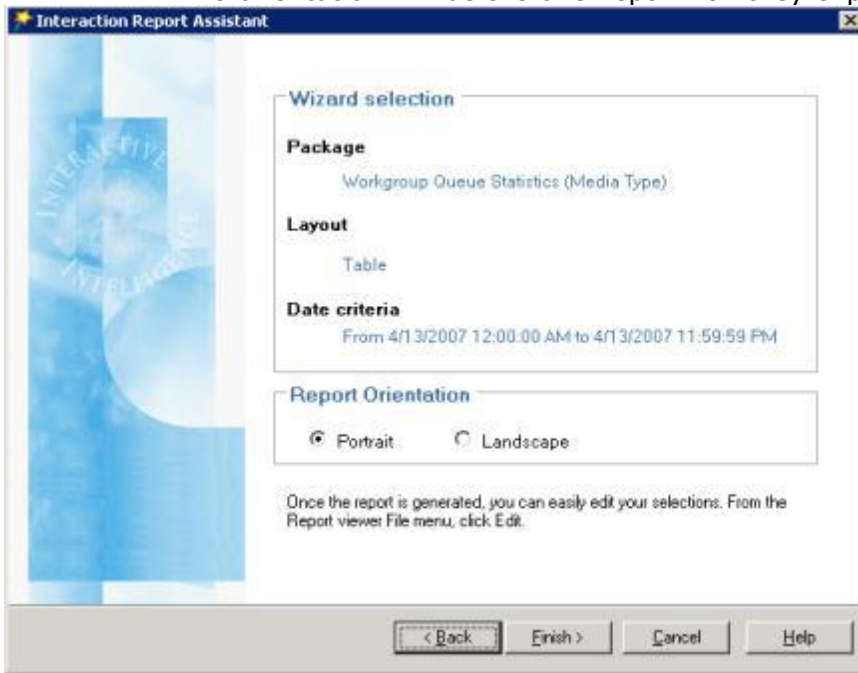
Groups and Summaries (Optional)
Select the groups and summaries to add on your report.

Group By	Friendly Name	Summary Type
☒	Interval Begin (Date/Time)	<None>
☐	User Logged In Time	<None>
☐	Interval duration	<None>
☐	Number ACD Entries	<None>
☐	Number Abandoned ACD	<None>
☐	Number Alerted ACD	<None>
☐	Number ACW Interactions	<None>
☐	Number Flow outs	<None>
☐	User Status ACW Time	<None>

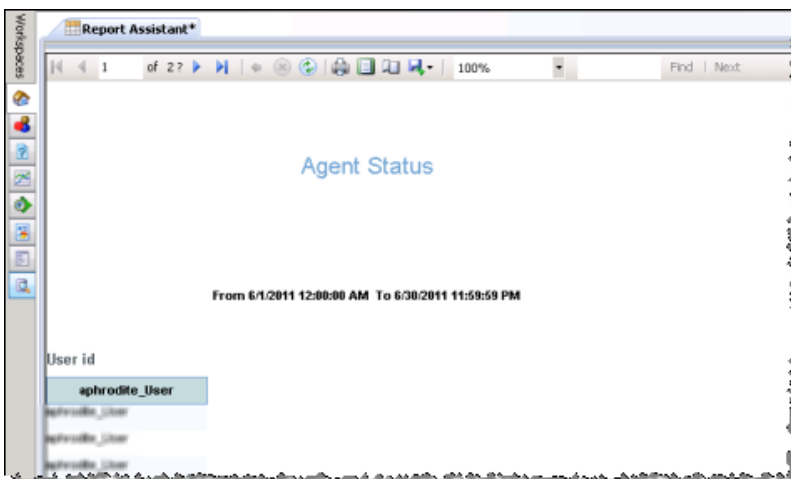
< Back Next > Cancel Help

15. Confirming their choices: The Wizard selection dialog displays the selections they made for the Package, Layout, and Date criteria for their report. In the Report Orientation box they

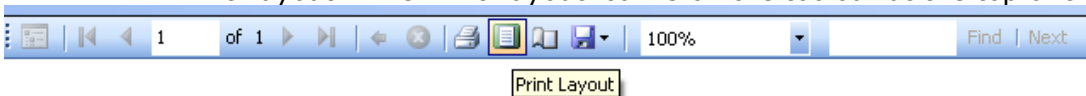
can change the format of the generated report. Click Back to change any of their selections. This orientation will be the one kept when they export their report.



16. Generating the report: When they click Finish, the generated report is displayed in the Workspace.



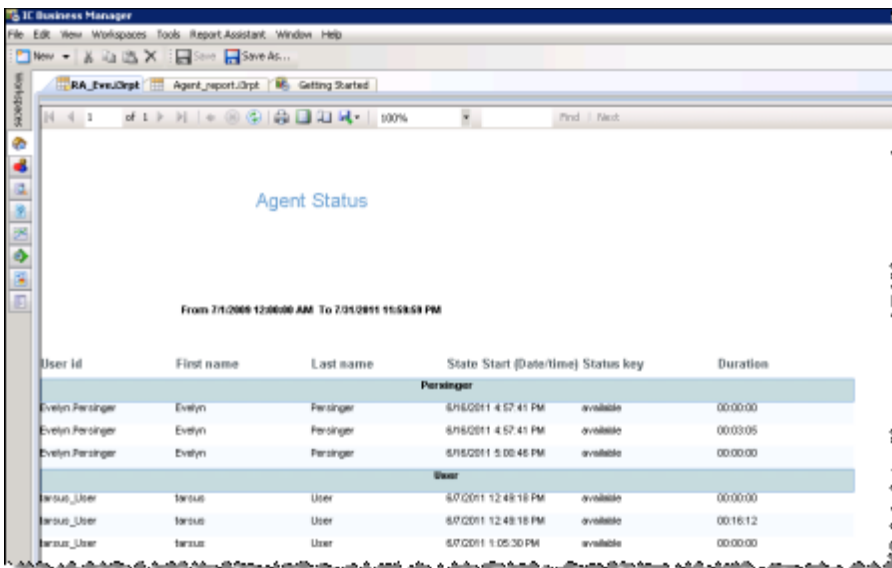
17. Print Layout: The Print Layout icon is on the toolbar at the top of the Report Viewer window.



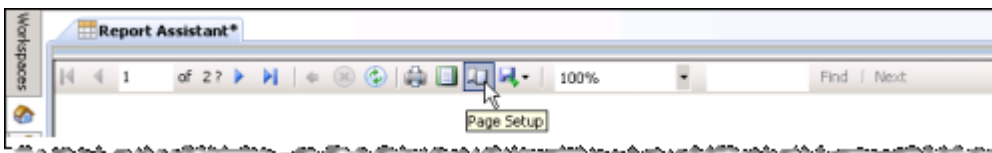
18. The Print Layout icon is a toggle command that allows them to switch between viewing the report in print layout and the report session. When Print Layout is on, they are able to visualize how the report will print. Print their report when Print Layout is on.



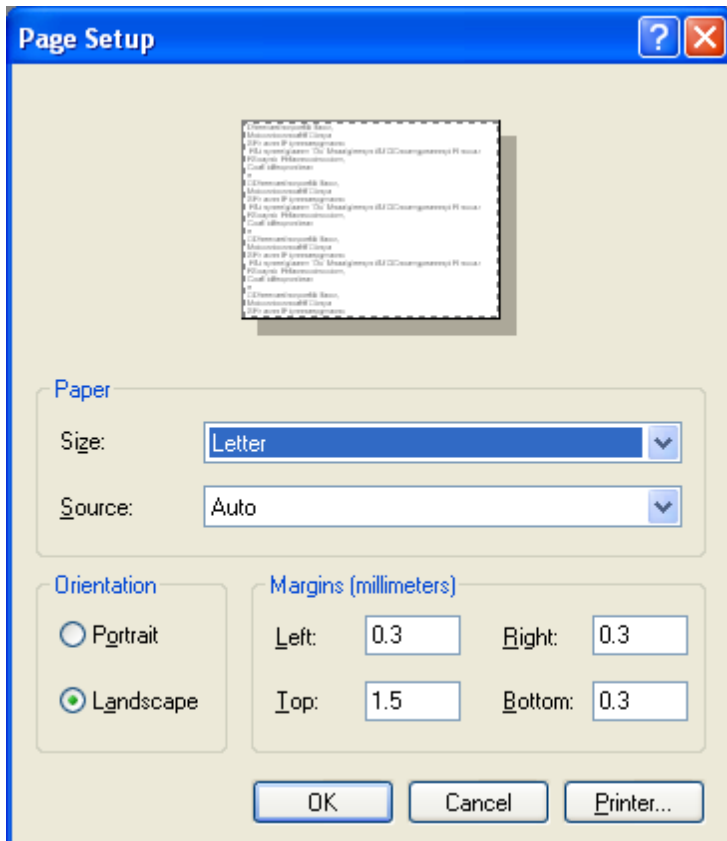
19. If Print Layout is off, the normal view of the report session is displayed in the Workspace.



20. Page Setup: The Page Setup icon is on the toolbar at the top of the Report Viewer in the Workspace.



21. Page Setup allows them to set up their report for printing purposes. Page dimensions are initialized by the application during the generation of the report. Use the Page Setup dialog to override these dimensions, for printing purposes. If they Export the report, the dimensions that were initially generated by the application are used, not the dimensions specified in the Page Setup dialog.



- **Save Report query Selection**

They can save the Supervisor's customized report selections as an Interaction Report Assistant File (*.i3rpt) to use again. Report selections that have not been saved display an asterisk (*) on the Report Tab. To save their report selections:

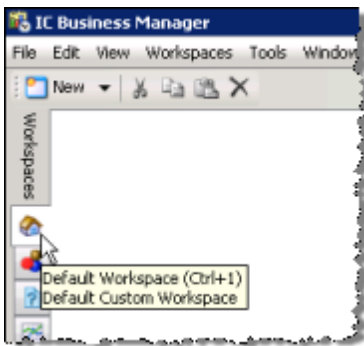
1. On the menu bar, click Report Assistant
2. On the Report Assistant menu, click Save, or Save As
3. On the dialog name their file, and click Save.

2.3.3.Open Interaction Report Assistant File

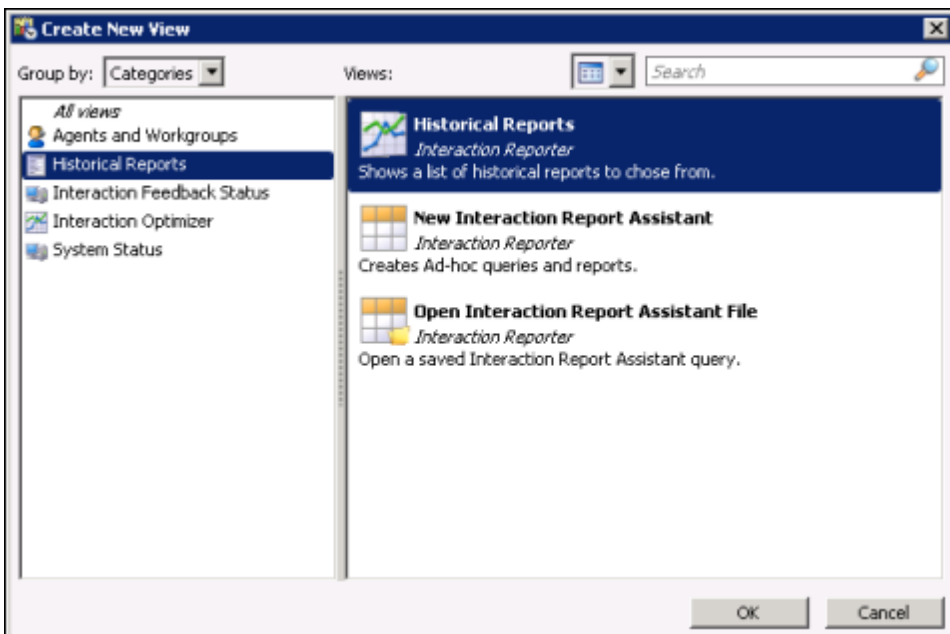
- **Open a saved report file**

Use the Open Interaction Report Assistant File dialog to open an Interaction Report Assistant File. To access the Open Interaction Report Assistant File dialog:

1. In IC Business Manager, click the Default Workspace module button.

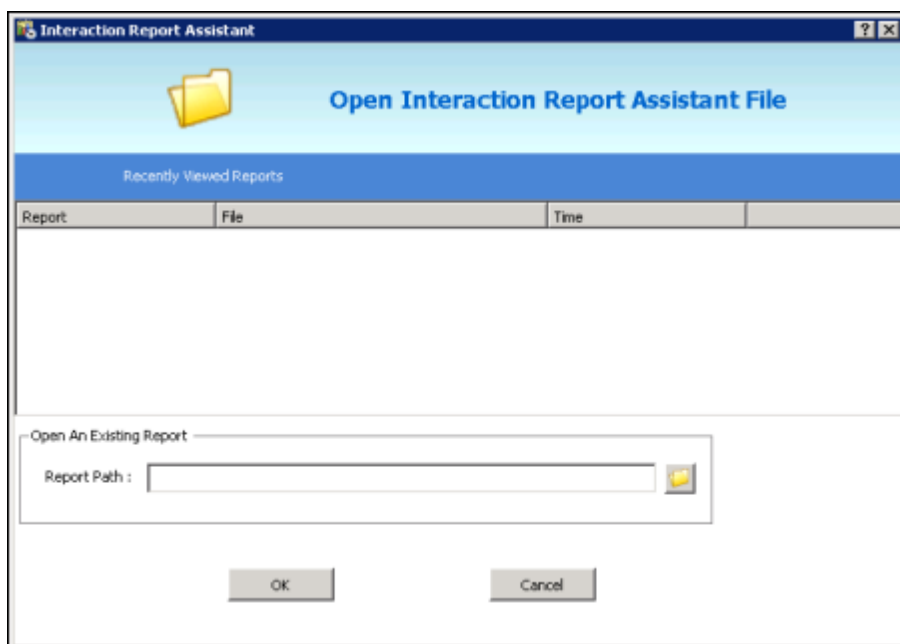
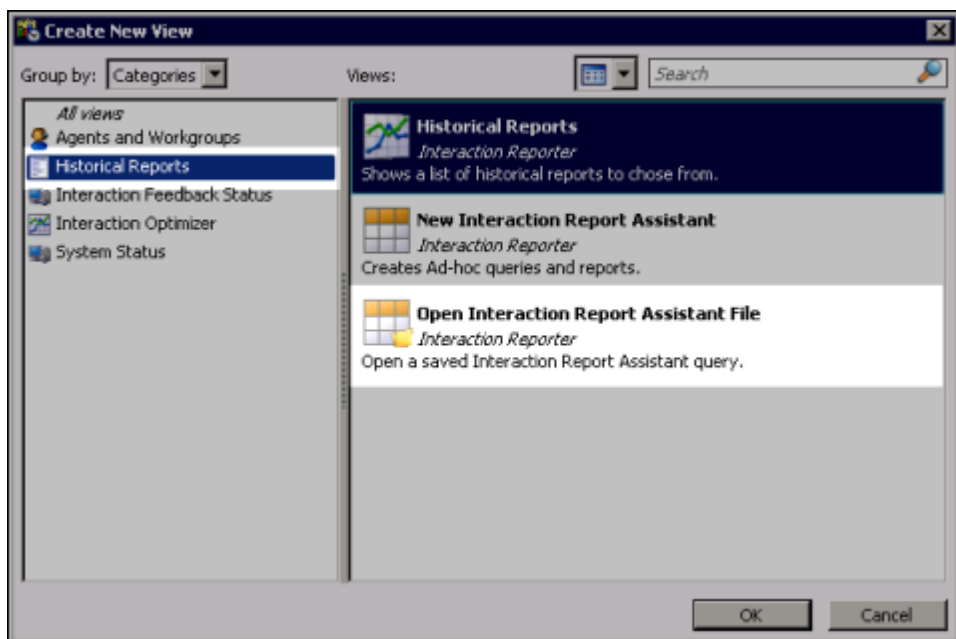


2. On the IC Business Manager toolbar, click New. The Create New View dialog will display.



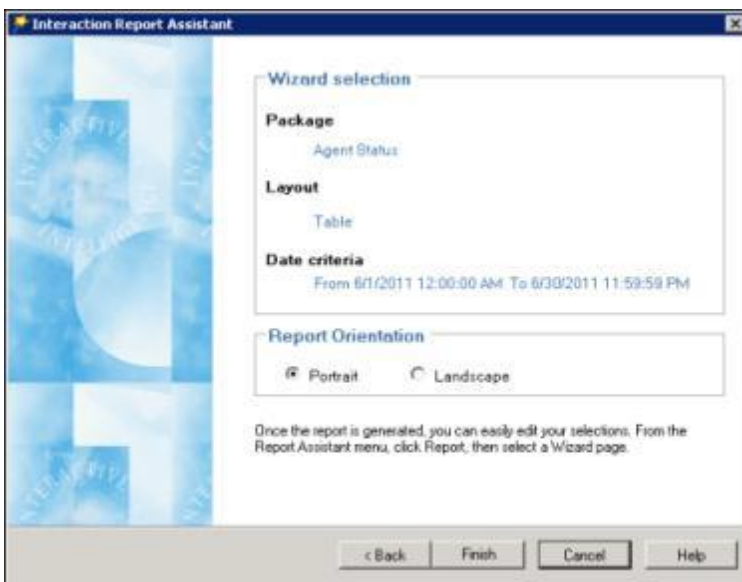
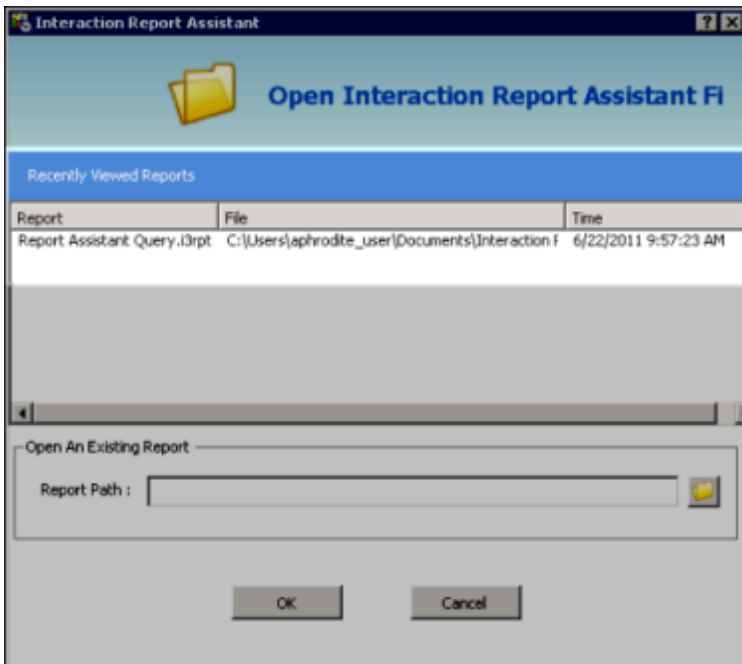
3. In the Group by drop-down, select Categories, and in the left pane select Historical Reports.

4. In the right pane, select **Open Interaction Report Assistant File**, and click **OK**. The Interaction Report Assistant Open Interaction Report Assistant File dialog is displayed. Use this dialog to open **Recently Viewed Reports** or **Open An Existing Report** from a saved Interaction Report Assistant file.

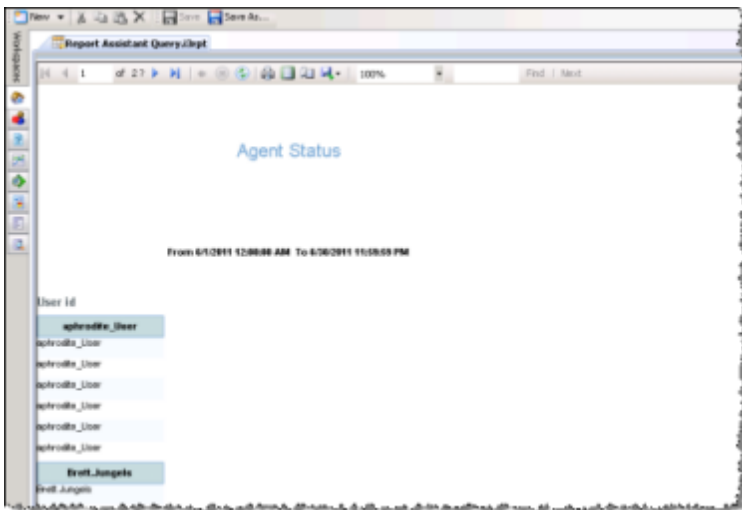


2.3.4.Recently Viewed Reports

1. To open a recently viewed and saved report, in the Open Interaction Report Assistant File dialog, under Recently Viewed Reports, select a saved report file, and click OK. The Interaction Report Assistant query is displayed.

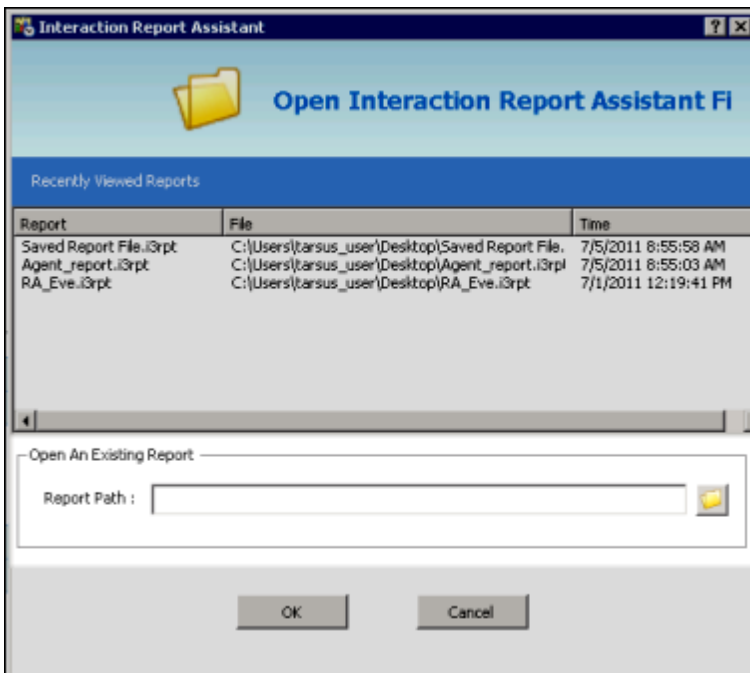


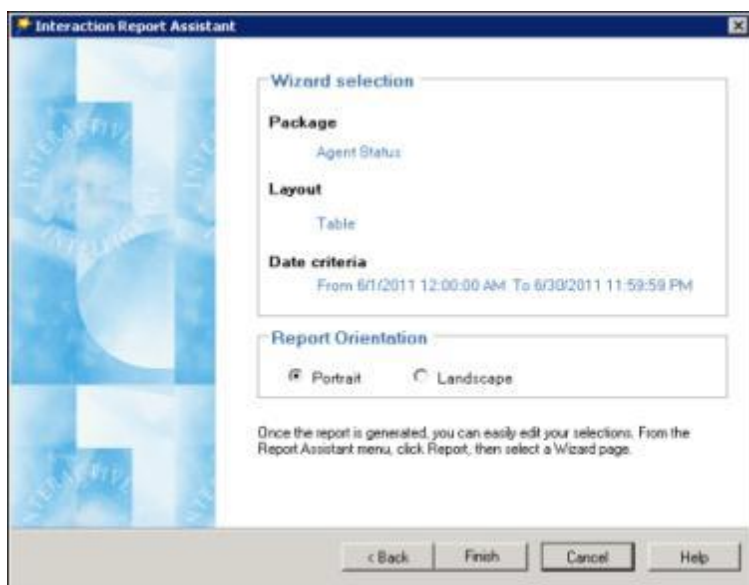
2. To generate and view the report, click Finish. The report is displayed in the Workspace.



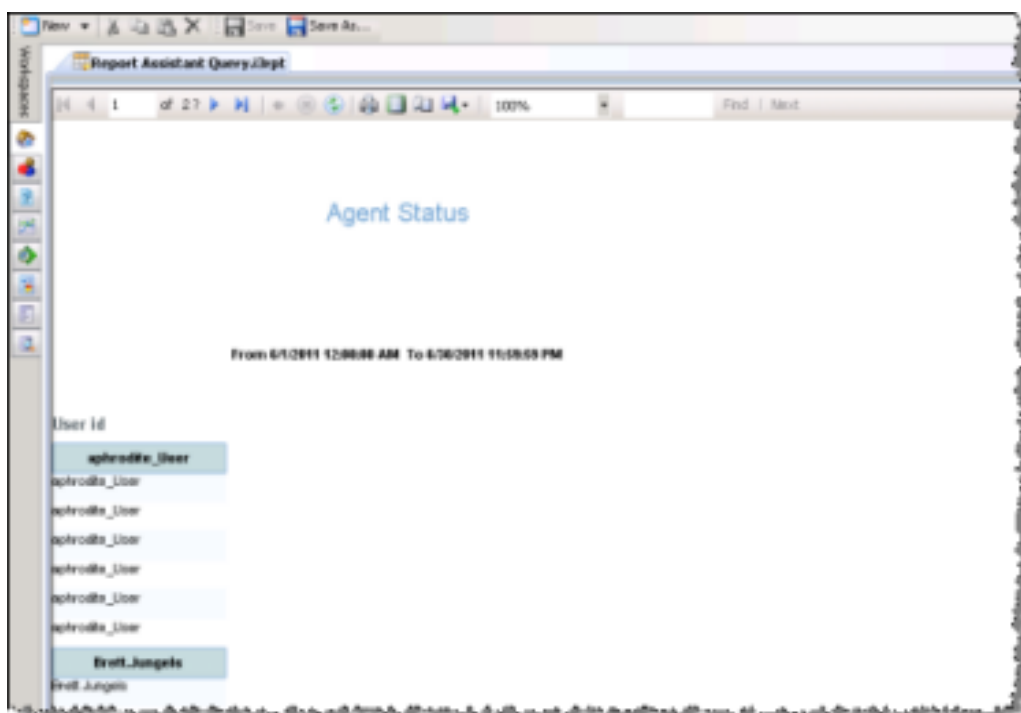
2.3.5.Saved Report Query

1. To open a saved report file and view the report, in the Open Interaction Report Assistant File dialog, under Open an Existing Report, use the browse button to select a Report Path, and click OK. The Interaction Report Assistant query is displayed.





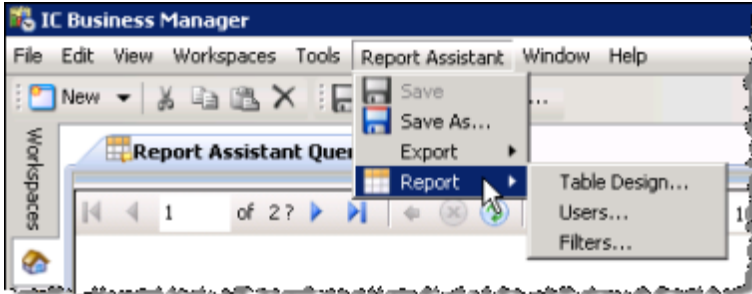
2. To generate and view the report, click Finish. The report is displayed in the Workspace.



2.3.6.Edit a Report

• Edit a Report Query

1. When a report is displayed in the Workspace, they can edit the query using the Report Assistant menu. On the menu bar, click Report Assistant, point to Report, and on the submenu select which part of the query they want to edit. The options are: Table Design, Users, and Filters.



2. Table Design: Select Table Design to make changes to fields and columns that appear in the report. When they click Table Design on the Report Assistant menu, the wizard page appears with their previous selections. Make their new selections and press Next to continue.
3. Users: Select Users to make changes to the users on which to run the report. When they click Users on the Report Assistant menu, the wizard page appears with their previous selections. Make their new selections and press Next to continue.
4. Filters: Select Filters to make changes to the filters that display the data in their report. When they click Filters on the Report Assistant menu, the wizard page appears with their previous selections. Make their new selections and press Next to continue.

2.3.7.Distributing a Report

• Saving a report to a file for distribution

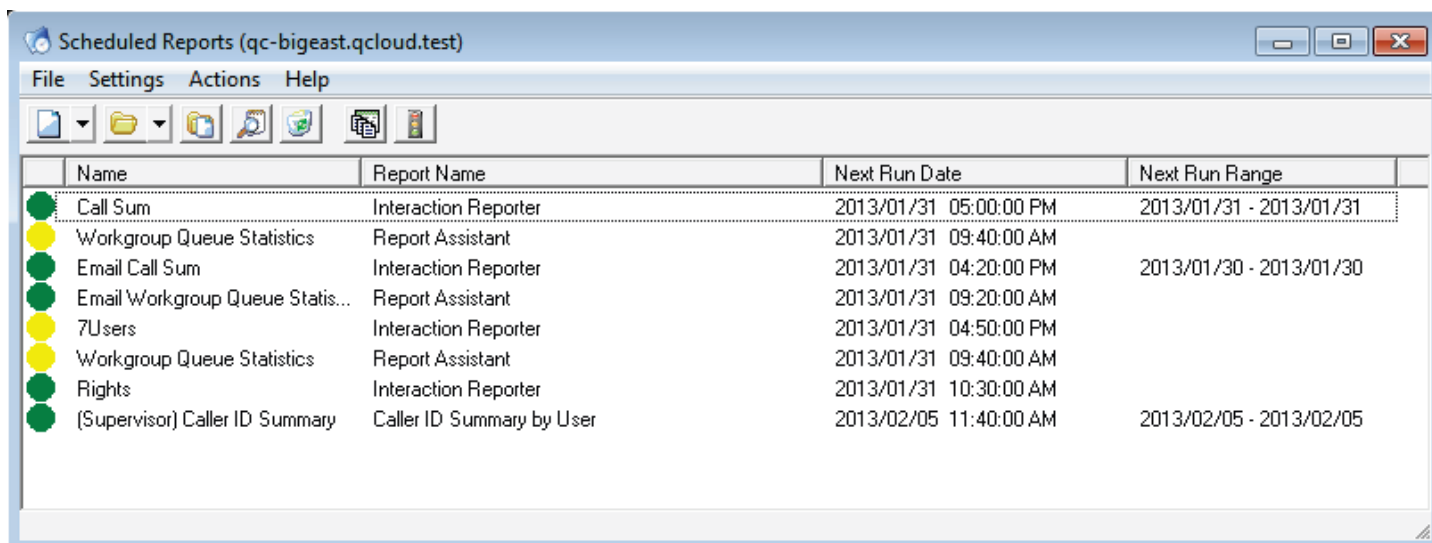
1. To save the report, on the menu bar, clicks Report Assistant; point to Export, and on the submenu select which format to export the report to. The export options are: Excel, PDF, and Word.

2.3.8.Scheduled Reports

Scheduled Reports allows Interaction Center users to schedule IC Historical Reports to run on a daily, weekly, or monthly, basis, and it can distribute those reports to multiple locations. The Scheduled Reports application consists of four main components: the database, monitoring service, IC handlers, and the Scheduled Reports Client.

- The database contains configuration information for each of the scheduled reports.
- The monitoring service sends a notification to the IC handlers to run a scheduled report and monitors for updates to the database.
- The IC handlers receive the notifications from the monitoring service at the time a report is scheduled to run.
- The Scheduled Reports Client is the user interface for report administrators to schedule the running and distributing of reports.

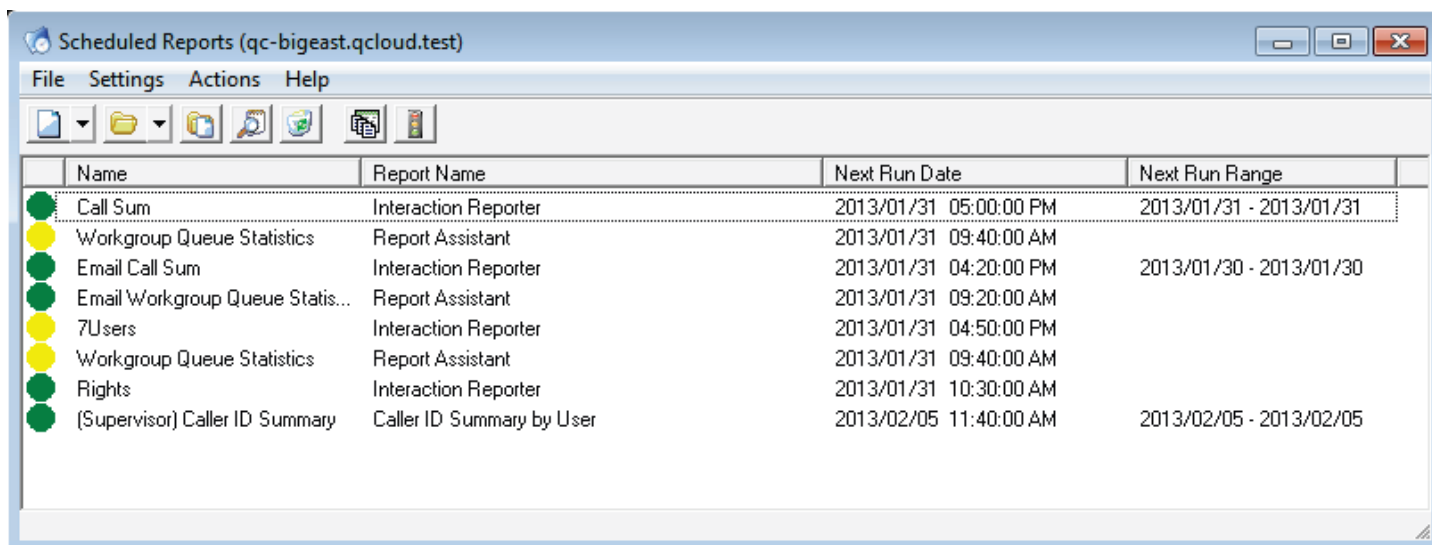
- **To start the Scheduled Reports Client on the Supervisor's workstation:**
 1. Click Start and select All Programs.
 2. Click Interactive Intelligence and select Scheduled Reports Client. The Interaction Scheduled Reports dialog opens.



	Name	Report Name	Next Run Date	Next Run Range
●	Call Sum	Interaction Reporter	2013/01/31 05:00:00 PM	2013/01/31 - 2013/01/31
●	Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
●	Email Call Sum	Interaction Reporter	2013/01/31 04:20:00 PM	2013/01/30 - 2013/01/30
●	Email Workgroup Queue Statis...	Report Assistant	2013/01/31 09:20:00 AM	
●	7Users	Interaction Reporter	2013/01/31 04:50:00 PM	
●	Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
●	Rights	Interaction Reporter	2013/01/31 10:30:00 AM	
●	(Supervisor) Caller ID Summary	Caller ID Summary by User	2013/02/05 11:40:00 AM	2013/02/05 - 2013/02/05

- **Understanding the Scheduled Reports Client interface**

The Scheduled Reports Client user interface includes a menu bar, toolbar, and a report list.



Scheduled Reports (qc-bigeast.qcloud.test)

	Name	Report Name	Next Run Date	Next Run Range
●	Call Sum	Interaction Reporter	2013/01/31 05:00:00 PM	2013/01/31 - 2013/01/31
●	Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
●	Email Call Sum	Interaction Reporter	2013/01/31 04:20:00 PM	2013/01/30 - 2013/01/30
●	Email Workgroup Queue Statis...	Report Assistant	2013/01/31 09:20:00 AM	
●	7Users	Interaction Reporter	2013/01/31 04:50:00 PM	
●	Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
●	Rights	Interaction Reporter	2013/01/31 10:30:00 AM	
●	(Supervisor) Caller ID Summary	Caller ID Summary by User	2013/02/05 11:40:00 AM	2013/02/05 - 2013/02/05

- **Using the toolbar**

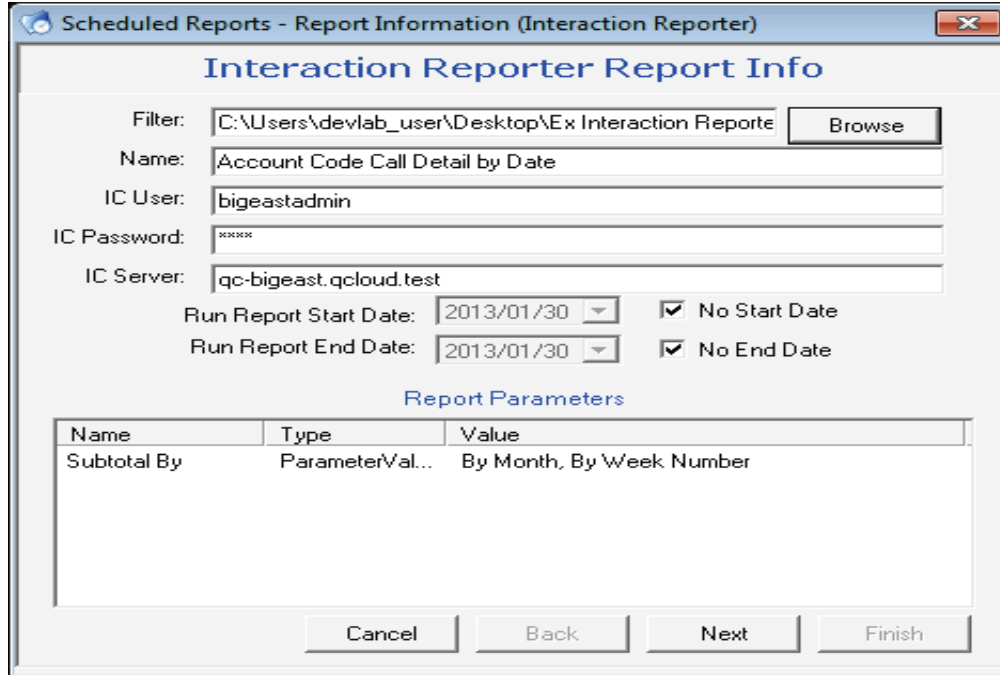
The Scheduled Reports Client toolbar contains buttons with the following commands:

Icon	Name	Function
	New	Click this button to create a new scheduled report. Options include New Crystal Reports Report, New Interaction Reporter Report, and New Report Assistant Report.
	Edit	Click this button to open a scheduled report to change.
	Copy	Click this button to create a new scheduled report from the currently selected report.
	Details	Click this button to display the details of the selected scheduled report.
	Delete	Click this button to delete the selected report.
	Test	Click this button to test the selected report for errors in configuration or distribution locations.
	Activate	Use this toggle button to activate and de-activate the selected report. Only activated reports run on their scheduled date and time.

- **Schedule a report**

1. Click the arrow at the end of the New button and select one of the following:
 - New Crystal Reports Report
 - New Interaction Reporter Report
 - New Report Assistant Report
2. If the Supervisor chose New Crystal Reports Report, the Crystal Reports Report Info dialog opens. Complete the following fields:
 - Name field. Type a name for the Scheduled Report. This name is displayed in the Name column of the report list.
 - Category drop-down list. Select a report category from this drop-down list. Reports from the selected category appear in the following Report field. If they select All, the Report field displays all available reports listed in the drop-down list.
 - Report drop-down list. Select the report to run from this drop-down list.
 - Description field. This field displays description stored in Interaction Administrator.
 - Run Report Start Date drop-down list. Select the date to begin running this report. If a future start date is not required, select the No Start Date check box to run the report at the next scheduled time.
 - Run Report End Date drop-down list. Select the date to stop running this report. If no stop date is required, select the No End Date check box to run the report according to the schedule.
 - Report Parameters. This area displays the list of parameters for this report as configured in Interaction Administrator.

3. If the Supervisor chose New Interaction Reporter Report, the Interaction Reporter Report Info dialog opens. Complete the following fields:



- Filter: Type the name of the Interaction Report filter, or click the Browse button to search for the .i3filter file.
 - Name field. Type the name of the Scheduled Report.
 - IC User: Type the IC user credentials.
 - IC Password: Type the IC password.
 - IC Server: Type the name of the IC server.
 - Run Report Start Date drop-down list. Select the date to begin running this report. If a future start date is not required, select the No Start Date check box to run the report at the next scheduled time.
 - Run Report End Date drop-down list. Select the date to stop running this report. If no stop date is required, select the No End Date check box to run the report according to the schedule.
 - Report Parameters. This area displays the list of parameters for this report as configured in Interaction Administrator.
4. If the Supervisor chooses New Report Assistant Report, the Report Assistant Report Info dialog opens. Complete the following fields:
 - a. Filter: Type the name of the Report Assistant filter, or click the Browse button to search for the .i3rpt file.
 - Name field. Type the name of the Scheduled Report.
 - IC User: Type the IC user credentials.
 - IC Password: Type the IC password.
 - IC Server: Type the name of the IC server.
 - Run Report Start Date drop-down list. Select the date to begin running this report. If a future start date is not required, select the No Start Date check box to run the report at the next scheduled time.
 - Run Report End Date drop-down list. Select the date to stop running this report. If no stop date is required, select the No End Date check box to run the report according to the schedule.
 - Report Parameters. This area displays the list of parameters for this report as configured in Interaction Administrator.

- For Crystal Reports only: To modify a report parameter, double-click the parameter in the Report Parameters list box. The Set Report Parameter dialog opens.

The 'Set Report Parameter' dialog box is shown. It has a title bar with a close button. The main area contains the following fields:

- Name: **DateTime**
- Description: **Enter date and time range or set of ranges.**
- Type: **DATETIME**

Below these fields are two sections:

- Discrete:** Contains three time pickers: Discrete (00:00:00), Start Range (07:30:00), and End Range (17:30:00).
- Multiple Parameters:** Contains a text box with the message 'Multiple Values not supported' and two arrow buttons (< and >>).

At the bottom are three buttons: 'Reset To Default', 'Apply', and 'Cancel'.

- The next step is to determine the method and format for distributing the report.

2.3.9.Determine and load output data (report) destination

- From the Scheduled Reports: Report Information dialog, click Next. The Scheduled Reports – Destination of Report dialog opens.

The 'Scheduled Reports - Report Destination' dialog box is shown. It has a title bar with a close button. The main area is titled 'Destination - Where do you want to send it?'. It contains three sections for different output methods:

- Email:** Includes a checkbox, a text field for 'Name' (Account Code Call Detail by Date), a 'Remove From List' button, a list box for 'Email Addresses', a 'Type or Select Address Here' dropdown, and a 'File Format' dropdown.
- File:** Includes a checkbox, a 'File Location' dropdown, a 'Select file location' dropdown, a 'File Format' dropdown, and an 'Overwrite Freq' dropdown.
- Printer:** Includes a checkbox, a 'Printer Location' dropdown, and a 'Select printer location' dropdown.

At the bottom are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

2. Use the Scheduled Reports – Destination of Report dialog to choose the method and format for distributing the scheduled report.

- **Distribute the report through e-mail**

1. In the Destination of Report dialog, select the Email check box.
2. In the Email Addresses drop-down list, enter a valid e-mail address to which to send the report and click add to add the address to the field on the right.
3. Repeat step two to add additional e-mail addresses to the list.
4. To delete an e-mail address, select the e-mail address and click remove.
5. In the File Format drop-down list, select the file format for the report.

- **Save the report to a file**

1. In the Destination of Report dialog, select the File check box. The fields in the File area are now made available.
2. Click the File Location drop-down list, choose a file path, and then click add to add the file paths to the list box on the right. The system saves the report in the file path locations in the list box on the right.
3. Repeat step two to add additional file paths to the list.
4. To delete paths from the list box, select the path and click remove.
5. In the File Format drop-down list, select the file format for the saved report file.
6. Use the Overwrite Freq drop-down list to determine when to overwrite report files. The default values are Daily, Weekly, Monthly, Yearly, or Never.

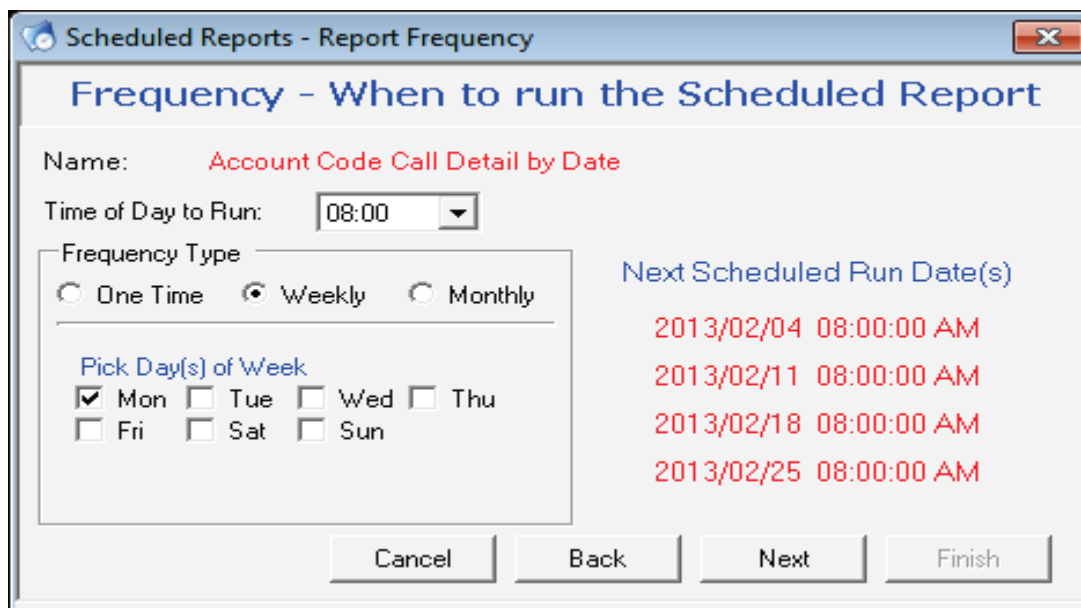
- **Send the report to a printer**

1. In the Destination of Report dialog, select the Printer check box. The fields in the Printer area are now made available.
2. In the Printer Location drop-down list, select the printer name to which to send the report.
3. Click Add to add the printer location to the list box on the right.
4. Repeat step two to add additional printer locations. The system sends the report to the printer locations in the list box on the right.
5. To delete locations from the list, click Remove.

2.3.10. **Schedule the time and frequency of the report generation**

After the Supervisor completes the destinations for their report, click on Next. The Scheduled Reports - Frequency of Reports dialog opens and the report name appears in the Name field.

Use the Frequency of Reports dialog to schedule when the report runs, including the time of day the report runs, how often they want it to run, and on what day of the week to run it.



Scheduled Reports - Report Frequency

Frequency - When to run the Scheduled Report

Name: **Account Code Call Detail by Date**

Time of Day to Run: **08:00**

Frequency Type

☐ One Time ☒ Weekly ☐ Monthly

Pick Day(s) of Week

☒ Mon ☐ Tue ☐ Wed ☐ Thu
☐ Fri ☐ Sat ☐ Sun

Next Scheduled Run Date(s)

2013/02/04 08:00:00 AM
2013/02/11 08:00:00 AM
2013/02/18 08:00:00 AM
2013/02/25 08:00:00 AM

Cancel Back Next Finish

- **To schedule the time and frequency of the report generation:**

1. In the Time of Day to Run drop-down list, select a time to run the report. Their administrator configures the lists of available times.
2. In the Frequency Type area, select the option for how often the Supervisor wants to run the report. The options are: One Time, Weekly, or Monthly.
3. In the Pick Day(s) of Week area, select the check boxes for the days of the week on which to run the report. The Next Scheduled Run Date(s) appear to the right of the dialog.
4. For Crystal Reports only, to designate a reporting period click Next.
5. For Interaction Reporter Reports and Report Assistant Reports, click Finish.

2.3.11.

Determine the report status

The report they created appears in the list of Scheduled Reports. When a report first appears in the list, colored status dots appear next to the report.

Name	Report Name	Next Run Date	Next Run Range
Call Sum	Interaction Reporter	2013/01/31 05:00:00 PM	2013/01/31 - 2013/01/31
Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
Email Call Sum	Interaction Reporter	2013/01/31 04:20:00 PM	2013/01/30 - 2013/01/30
Email Workgroup Queue Statis...	Report Assistant	2013/01/31 09:20:00 AM	
7Users	Interaction Reporter	2013/01/31 04:50:00 PM	
Workgroup Queue Statistics	Report Assistant	2013/01/31 09:40:00 AM	
Rights	Interaction Reporter	2013/01/31 10:30:00 AM	
(Supervisor) Caller ID Summary	Caller ID Summary by User	2013/02/05 11:40:00 AM	2013/02/05 - 2013/02/05
Account Code Call Detail by D...	Account Code Call Detail by Date	2013/02/04 08:00:00 AM	2013/02/04 - 2013/02/04

- **These colored dots indicate the report status:**

- A yellow status dot indicates that the report is not active.
- A green status dot indicates that a report is active and ready to be run.
- A red status dot indicates that errors exist in the configuration. The report cannot run until the Supervisor corrects these errors.

2.3.12.

Activate a report

To activate a report, in the Interaction Scheduled Reports dialog, select the report the Supervisor wants to activate, and on the toolbar click activate.

A green status dot appears next to the report, indicating that this report is active.

Name	Report Name	Next Run Date	Next Run Range
CS & Sales Distribution Queue ...	Distribution Queue Performance (Date by Queue)	08/23/2004 01:00:00 AM	08/09/2004 - 08/15/2004
Support Response Report	Response Report	08/31/2004 01:00:00 AM	07/01/2004 - 07/31/2004
Test	(Supervisor) Agent Availability Detail	08/23/2004 01:00:00 AM	08/22/2004 - 08/28/2004

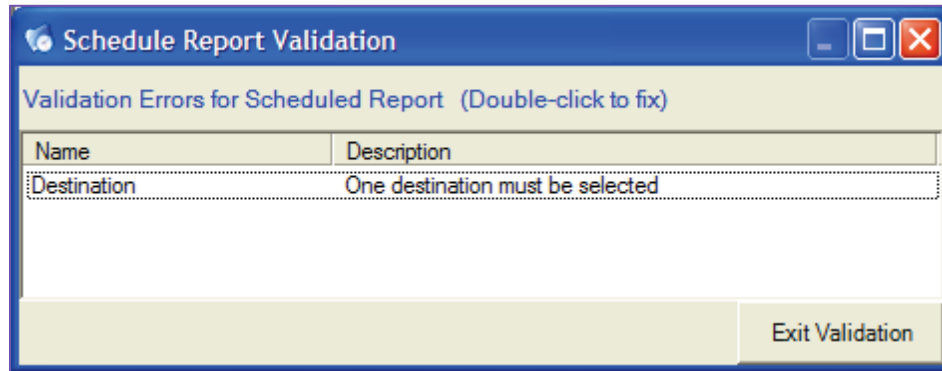
2.3.13.

Resolve configuration errors

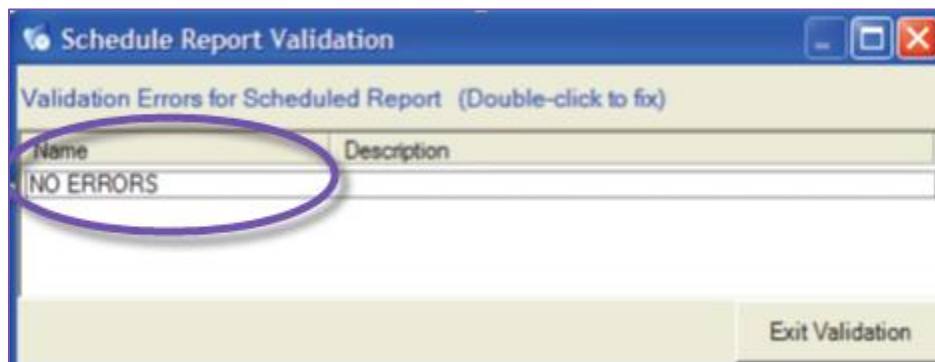
If a configuration error exists, a red status dot appears next to the report. The red status dot indicates that a parameter is missing from the configuration. The report will not run until they correct the error.

- **To identify and resolve the missing parameter:**

1. In the Interaction Scheduled Reports dialog, select the report with the red status dot.
2. On the toolbar, click test. The Schedule Report Validation dialog opens.



3. The Schedule Report Validation dialog displays the Name and Description of the validation error. To correct the error, double-click the line with the error. The dialog that contains the error opens.
4. Correct the parameter error, and click Finish to continue. The Schedule Report Validation dialog reopens.
5. Continue to correct all errors until the Schedule Report Validation dialog indicates that NO ERRORS are present.



6. When no other errors exist, click Exit Validation to close the dialog. The system returns to the Interaction Scheduled Reports dialog, and the status for the corrected report is no longer red.

2.3.14.

Historic Reports

- **Flexible Fields (IC Standard)**

Flexible Fields are columns in an IC Standard Historical Report that can be easily customized in Interaction Administrator to display different data, depending on the Supervisor's reporting needs.

- **Flexible Fields and Columns**

- CSR Performance Reports:
 - CSR Performance Detail and Summary reports
 - CSR Performance Detail for Queue by Interval report
 - CSR Performance Detail for Queue by Date by Interaction Type report
- Queue Performance Reports:
 - Distribution Queue Performance (multiple versions of this report)
 - Queue Period Statistics Abandon reports
 - Queue Period Statistics Response reports

• Statistics Group DNIS Daily report

To see a listing of the reports that contains one or more flexible fields: In the Interaction Supervisor applications, go to the Historical Reports view, click on the Help menu at the top, and then select the Content option. In the Contents tab window, expand the option for Report Parameters and select "Configuring Flexible Fields". A list of reports that contain Flexible Fields will be displayed on the right.

In the Supervisor's Interaction Supervisor on-line help, at the screen shown above, click on the link for this report: Distribution Queue Performance (Queue by Date). They will then see a sample of the report, such as seen below, which shows the default columns of data for this report.

Distribution Queue Performance (Queue by Date)												
Queue Range:	customer support											
Date Time Range:	09/12/2011 00:00:00 - 09/16/2011 23:59:59											
Shift Time Range:	00:00:00 - 23:59:59											
Site ID Range:	0-999											
	Ints Ans	Avg Talk	Total Talk	Avg ACW	Total ACW	Ints Aban	Avg Aban	% Aband	Max Wait Ans	Avg Speed Ans	Svc Lvl 1	Load Ratio
SiteID: 1												
Customer Support												
9/12/2011	26	:02:06	:52:18	:00:00	:00:00	0	:00:00	0.00%	:00:16	:00:05	96.00%	89.76%
9/13/2011	31	:02:09	01:06:31	:00:00	:00:00	0	:00:00	0.00%	:01:27	:00:13	70.97%	99.90%
9/14/2011	21	:02:24	:50:21	:00:00	:00:00	3	:00:18	12.50%	:00:44	:00:12	66.67%	100.07%
9/15/2011	34	:01:59	01:07:30	:00:00	:00:00	0	:00:00	0.00%	:01:07	:00:08	82.35%	100.45%
9/16/2011	32	:03:11	01:41:43	:00:00	:00:00	1	:00:05	3.03%	:00:50	:00:08	90.63%	137.89%
Customer Support	143	:02:22	05:38:23	:00:00	:00:00	4	:00:15	2.72%	:01:27	:00:09	81.82%	107.04%

- Fields and columns that are flexible (Distribution Queue Performance report)**
 This section displays: The Report Element / column names, The Report Field or Values in the database, and the Field or Value Descriptions. Scroll through the listing and the Supervisor will see which Fields are identified as flexible for this report (partial listing shown below).

Flexible Field 1: Avg Wait Ans	$t\text{AnsweredACD} / n\text{AnsweredACD}$	~~Default Flexible Field:~~ The average amount of time the interaction spent alerting before it was answered by the agent.
Flexible Field 1: Svc Lvl 1 %	$(n\text{AnsweredACDSvcLvlnote} / n\text{AnsweredACD}) * 100$	Flexible Field: The percentage of calls that were answered within the first service level. The first service level interval is determined in Interactive Administrator and the default first service level is 10 seconds.
Flexible Field 1: Load Ratio	$t\text{TalkedACD} / t\text{AgentOnACDCall}$	Flexible Field: The ratio of total ACD talk time to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 1: Load - Hold	$(t\text{TalkedACD} - t\text{HoldACD}) / (t\text{AgentOnACDCall} + t\text{AgentInACW})$	Flexible Field: The ratio of total ACD talk time minus the time the interactions were on hold to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 1: Disconnect	$n\text{LocalDisconnectACD}$	Flexible Field: The number of ACD calls that were disconnected locally.
Flexible Field 2: Avg Wait Ans	$t\text{AnsweredACD} / n\text{AnsweredACD}$	Flexible Field: The average amount of time the interaction spent alerting before it was answered by the agent.
Flexible Field 2: Svc Lvl 1 %	$(n\text{AnsweredACDSvcLvlnote} / n\text{AnsweredACD}) * 100$	~~Default Flexible Field:~~ The percentage of calls that were answered within the first service level. The first service level interval is determined in Interactive Administrator and the default first service level is 10 seconds.
Flexible Field 2: Load Ratio	$t\text{TalkedACD} / (t\text{AgentOnACDCall} + t\text{AgentInACW})$	Flexible Field: The ratio of total ACD talk time to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 2: Load - Hold	$(t\text{TalkedACD} - t\text{HoldACD}) / (t\text{AgentOnACDCall} + t\text{AgentInACW})$	Flexible Field: The ratio of total ACD talk time minus the time the interactions were on hold to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 2: Disconnect	$n\text{LocalDisconnectACD}$	Flexible Field: The number of ACD calls that were disconnected locally.

Flexible Field 3: Avg Wait Ans	$\frac{tAnsweredACD}{nAnsweredACD}$	Flexible Field: The average amount of time the interaction spent alerting before it was answered by the agent.
Flexible Field 3: Svc Lvl 1 %	$\frac{(nAnsweredACDSvcLvlnote}{nAnsweredACD)} * 100$	Flexible Field: The percentage of calls that were answered within the first service level. The first service level interval is determined in Interactive Administrator and the default first service level is 10 seconds.
Flexible Field 3: Load Ratio	$\frac{tTalkedACD}{(tAgentOnACDCall+tAgentInACW)}$	Default Flexible Field: The ratio of total ACD talk time to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 3: Load - Hold	$\frac{(tTalkedACD - tHoldACD)}{(tAgentOnACDCall+tAgentInACW)}$	Flexible Field: The ratio of total ACD talk time minus the time the interactions were on hold to the amount of time actually worked during the selected interval. This ratio is most meaningful when agents are allowed to take multiple interactions at the same time.
Flexible Field 3: Disconnect	nLocalDisconnectACD	Flexible Field: The number of ACD calls that were disconnected locally.

• **Interaction Administrator to determine the values for each flexible field**

1. In Interaction Administrator, in the System Configuration options on the left, select the Reports container. Then from the list of reports on the right, double-click on the Distribution Queue Performance (Queue by Date) report.



2. In the resulting Report Configuration dialogue goes to the Tables/Parameters tab.
3. In the Parameter Definitions list box on the right, select one of the flexible fields and click the Edit button.

4. In the resulting Parameter Data dialogue (screen shot below), on the Parameter Definition tab, the Prompt text box lists the value choices for the selected flexible column. The Supervisor can click in the field and arrow right or left to see all of the choices. Each choice has a corresponding number, and the Default Value field shows which value is currently displayed when they run this particular report.

- **Flexible/Column/Field 1 (Distribution Queue Performance report):**

- 1 = Average Wait to Answer (How long caller waited in Queue for a CSR to answer)
- 2 = Answered Service Level 1 (% of calls answered in the first Service Level)
- 3 = Load Ratio (Ratio of total ACD talk time to the amount of time actually worked during the selected interval.)
- 4 = Load – Hold Ratio (Ratio of total ACD talk time minus the time the interactions were on hold to the amount of time actually worked during the selected interval.)
- 5 = Entered ACD (Number of interactions that entered the queue)
- 6 = Transferred ACD (Number of interactions that were transferred while in the queue)
- 7 = Flow Out ACD (Number of interactions in the Q that flow from one Q to another Q before connecting to a CSR. If when waiting in an ACD queue the caller has the option to leave a voice mail and they choose that option, transferring the call from the Q directly to a mailbox will count as an Abandon in the Q. To avoid that, transfer the call to another Q named CS VM Q, for instance, and make the action of the 2nd queue to "Send to voicemail". That way, the first Q will show a flow out and the 2nd queue will show all abandons.)
- 8 = Local Disconnect ACD (The number of ACD calls that were disconnected locally)
- 9 = Supervisor Requests (When CSRs clicks the Assistance button in Interaction Client)
- 10 = Custom Value 1 (requires custom handler configuration)
- 11 = Custom Value 2 (requires custom handler configuration)
- If everyone in the Supervisor's organization who utilizes this report wants to see the same statistic in the flexible field(s), then in the Default Value field enter the value for the corresponding statistic that they want to appear on default standard report. However, if different groups want to see different statistics in the flexible field(s), then follow the instructions below to first make a copy of the default standard report and then change the flexible field on the new copy of the report.

- **Change a flexible fields for a specific workgroup or purpose**

If different workgroups in their contact center want to display different columns of data on the report, or if one workgroup wants different versions of the report (to display different flexible values), they can copy the original report, rename it for that workgroup or purpose, and change the appropriate flexible fields accordingly.

1. In IC Admin highlight the report to copy
2. Select Edit
3. Choose Copy
4. Click on Edit
5. Then choose Paste

Report Name	Display Name	Category	File Name
PREDICTIVE_CALLDETAIL	Dialer Call Detail Report	Predictive	\${ReportFileP...
PREDICTIVE_DIALER_AUDIT	Dialer Audit Report	Predictive	\${ReportFileP...
PREDICTIVE_DISPOSITION_ACTIVITY	Dialer Disposition Activity Report	Predictive	\${ReportFileP...
PREDICTIVE_DISPOSITION_BY_HOUR	Dialer Disposition by Hour	Predictive	\${ReportFileP...
PREDICTIVE_FINISHCODE	Dialer Finishcode Detail by Agent	Predictive	\${ReportFileP...
PREDICTIVE_FINISHCODE_BY_HOUR	Dialer Finishcode Summary by Hour	Predictive	\${ReportFileP...
PREDICTIVE_FINISHCODE_SUMMARY	Dialer Finishcode Summary by Agent	Predictive	\${ReportFileP...
PREDICTIVE_REASONCODE_SUMMARY	Dialer Reason Code Distribution	Predictive	\${ReportFileP...
QPS_DS_DATE_QUEUE	Distribution Queue Performance (Date by Queue)	Queue	\${ReportFileP...
QPS_DS_DATE_QUEUE_MEDIATYPE	Distribution Queue Performance (Date by Queue...	Queue	\${ReportFileP...
QPS_DS_QUEUE_DATE	Distribution Queue Performance (Queue by Date)	Queue	\${ReportFileP...
QPS_DS_QUEUE_DATE_GROUP	Distribution Queue Performance (Queue by Date...	Queue	\${ReportFileP...
QPS_DS_QUEUE_DATE_INTERVAL	Distribution Queue Performance (Queue by Date...	Queue	\${ReportFileP...
QPS_DS_QUEUE_DATE_MEDIATYPE	Distribution Queue Performance (Queue by Date...	Queue	\${ReportFileP...
QPS_DS_QUEUE_MEDIATYPE	Distribution Queue Performance (Queue by Inte...	Queue	\${ReportFileP...
QUEUE_PERIOD_ABANDON	Queue Period Statistics Abandon Report	Queue	\${ReportFileP...
QUEUE_PERIOD_ABANDON_ACCUM	Queue Period Statistics Abandon Report (Accum...	Queue	\${ReportFileP...

6. Enter a name for the new report. So that the modified report appears in the listing next to the original report, only add to the end of the original report name – something that identifies the workgroup or purpose of the report, such as "Custom" or "Customer Service".

Report Name	Display Name
PREDICTIVE_CALLEDDETAIL	Display Call Detail Report
PREDICTIVE_DIALER_AUDIT	ort
PREDICTIVE_DISPOSITION	Activity Report
PREDICTIVE_DISPOSITION	by Hour
PREDICTIVE_FINISHCODE	Detail by Agent
PREDICTIVE_FINISHCODE	Summary by Hour
PREDICTIVE_FINISHCODE	Summary by Agent
PREDICTIVE_REASONCODE	ide Distribution
QPS_DS_DATE_QUEUE	ue Performance (Date by Queue)
QPS_DS_DATE_QUEUE_MI	ue Performance (Date by Queue...
QPS_DS_QUEUE_DATE	ue Performance (Queue by Date)
QPS_DS_QUEUE_DATE_GF	ue Performance (Queue by Date...
QPS_DS_QUEUE_DATE_IN	ue Performance (Queue by Date...
QPS_DS_QUEUE_DATE_MEDIATYPE	Distribution Queue Performance (Queue by Date...
QPS_DS_QUEUE_DATE_MEDIATYPE	Distribution Queue Performance (Queue by Inte...

Entry Name ? X

Enter Report Name

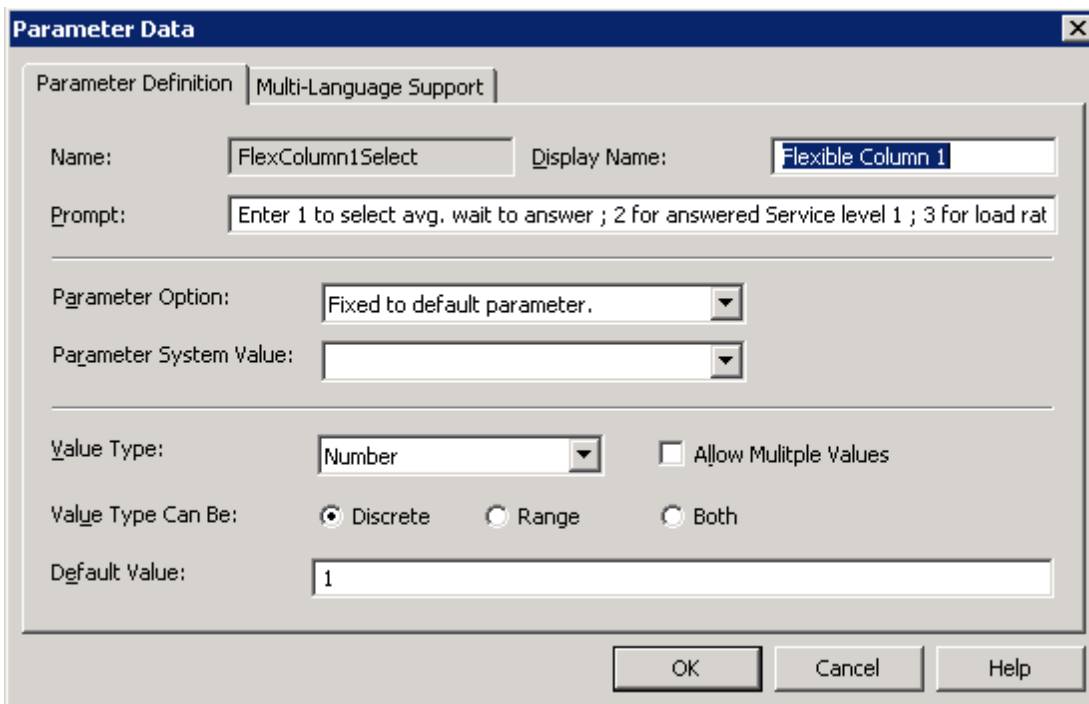
QPS_DS_QUEUE_DATE_CS_CUSTOM

OK Cancel

7. Re-sort the list. When the Supervisor first copy, paste, and name the new report, it will show up at the end of the report listing. They can re-sort the list alphabetically by clicking on the column heading "Report Name".

- **Modifying a report by changing a Flexible Field**

7. In the list of reports, double-click on the report they want to modify (probably their newly-created report) to open it up for editing.
8. b. In the resulting Report Configuration dialogue, select the Tables/Parameters tab
9. c. In the Parameter Definitions list box on the right, select the flexible field they want to modify and click Edit.
10. d. In the resulting Parameter Data dialogue, on the Parameter Definition tab, the Prompt text box lists the value choices for the selected flexible column.
11. e. Select the option the Supervisor wishes to appear on their report, and enter the associated number in the Default Value field at the bottom of the tab. Click OK to save.
12. f. Return to their Interaction Supervisor application and run the newly modified report to verify it displays what they want.



The image shows a 'Parameter Data' dialog box with two tabs: 'Parameter Definition' and 'Multi-Language Support'. The 'Parameter Definition' tab is active. It contains the following fields and controls:

- Name:** FlexColumn1Select
- Display Name:** Flexible Column 1
- Prompt:** Enter 1 to select avg. wait to answer ; 2 for answered Service level 1 ; 3 for load rat
- Parameter Option:** Fixed to default parameter. (dropdown menu)
- Parameter System Value:** (dropdown menu)
- Value Type:** Number (dropdown menu)
- Allow Multiple Values:** ☐ (checkbox)
- Value Type Can Be:** ☒ Discrete ☐ Range ☐ Both (radio buttons)
- Default Value:** 1

At the bottom of the dialog box are three buttons: OK, Cancel, and Help.

Warning!! For reports that have more than one version of the report and that shows the same type of data (e.g. CSR Performance Detail and CSR Performance Summary reports), if the Supervisor changes a Default Value for one version of the report (e.g. Detail), be sure to make the same change in the Default Value for the other version(s) of the report so that all versions provide them with the same data columns.

Always be sure to document their changes and keep the change logs in a location where other team members can locate them.

2.3.15.

DNIS Detail Report

The DNIS Detail report was designed for organizations that use multiple inbound numbers to connect with workgroups, departments, and employees. Oftentimes, DNIS (Dialed Number Information Service) is used for toll-free numbers that are given to customers to reach a contact center. For reporting purposes, DNIS is very useful in segmenting call volume, based on the numbers their callers dialed.

The DNIS Detail report displays a detail of inbound calls and chats for each DNIS for each day in the selected date range. It shows duration, direction, and hold time. This report can be used by a Supervisor to help determine which calls and chats were received, per DNIS during a specific time range.

- **Sort Parameter Options**

The DNIS Detail Report allows several options on which a report may be grouped / sorted. They can specify a range of dates, times, DNIS's, and site IDs to include in the report. IC sorts this report by DNIS, then by date, and then by time. A summary of calls for each DNIS is shown first, followed by the details of each call to the DNIS. Descriptions of each tab in the Report Parameters dialog box that is shown in the below screenshot...

Enter Report Parameters for DNIS Detail Report

Date Time Range | DNIS | Site ID | Purpose Code

Enter date and time range or set of ranges.

09/21/2011 00:00:00 - 09/21/2011 23:59:59

Start of range: 9/21/2011 8:57:52 AM

End of range: 9/21/2011 8:57:52 AM

Add

Start	End
09/21/2011 00:00:00	09/21/2011 23:59:59

Delete

Cancel Load Save Review Run

- **Date Time Range:** Allows a single date or a range of dates separated by a hyphen.
- **DNIS:** Allows a discrete (single) DNIS or a range of DNIS's to be entered using string format.
- **Site ID:** If their IC system is configured as a multi-site system (not just multiple office locations running off of one IC server; but multiple IC servers, where each one is configured as its own site), then the Site ID parameter allows individual sites or a range of sites to be queried.
- **Purpose Code:** When the interaction type is "Call", this further segments the type of call placed (see code descriptions in the below table.)

Purpose Code	Description
Null or 0	No specific purpose has been assigned to this call object.
1	Fax
2	Call initiated by Interaction Dialer
3	Tie Line
4	Remote Station
5	Forward
6	Conference Bridge
7	Voicemail Return
8	Follow me
9	SIP Station
>100	All values above 100 are user-defined as needed in Handlers.

- **Data Origin and Fields:**

All statistics on the DNIS Detail report are pulled from one reporting table: Call Detail Record (CDR).

While some fields pull raw data from the Call Detail log, most fields appearing on the report are calculated values, using raw data and formulas in Crystal Reports.

Log field names and/or calculations, and descriptions for each report field:

Summary/ Detail	Report Field	Table Field(s)	Description	Calculation
Summary	DNIS	DNIS	DNIS obtained for an inbound call from the network	Not applicable
	Total Call Duration	CallDurationSeconds	Total time spent on calls for the specified DNIS	Sum (CallDurationSeconds)
	Average Duration	CallDurationSeconds, ConnectedDate	Average amount of time spent on calls with the DNIS	Sum (CallDurationSeconds)/Count(ConnectedDate)
Detail	Date Time	ConnectedDate	DNIS call Date and Time	Not applicable
	Caller ID	RemoteNumberFmt	Formatted version of the remote number	Not applicable
	Name	RemoteName	Calling party's name if information is passed with the caller ID	Not applicable

	User	LocalUserId	User ID (as defined in IA) for person receiving call	Not applicable
	Extension	LocalNumber	Local phone number of the extension number receiving the call	Not applicable
	Station ID	CallDurationSeconds	Time spent on specified DNIS call	Not applicable
	Call Duration	CallDurationSeconds	Duration of call expressed as hh:mm:ss	Not applicable
	Hold Time	HoldDurationSeconds	Duration that the call was in a hold status (hh:mm:ss)	Not applicable

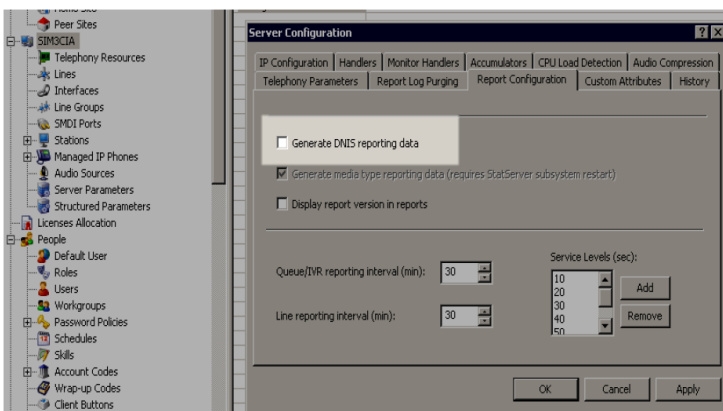
• Additional Information:

In order to allow any pre-defined post-interaction handlers to make modifications, the data for the Call Detail Record table is collected one minute after an interaction ends / disconnects. Any handler modifications are therefore made before the actual statistics are logged.

Because information is collected only on the final user who touched an interaction in the Call Detail Record log, the DNIS Detail report is not intended for use in evaluating Users, rather for reporting on volume and attributes associated with calls placed on specific DNIS numbers.

Due to only the final User information being recorded in the log, as well as the Call Detail Record table not being associated with specific interval settings (such as the interval queue and line statistics logs), this table has very limited relationships with other tables that are used for reporting.

Analysis of database requirements of IC demonstrates that the collection of DNIS statistics significantly increases the amount of data collection. In order to activate DNIS collection in the Queue Period Statistics table, DNIS data collection must be activated. It is activated in Interaction Administrator > Server Configuration > open the main container for editing >Report Configuration tab > check the "Generate DNIS reporting data" check box.



- Report Construction Schematic:

DNIS Detail Report		Data Source: <i>CallDetailRecord table (CDR log)</i>																	
DNIS Range:	1-999	Parameters DNIS Range: DNIS (string format) Site ID Range: SiteId Date Time Range: ConnectedDate Purpose Code Range: see list pg. 3	INTERACTIVE INTELLIGENCE Default Sort Hierarchy: DNIS -> Date																
Site ID Range:	0-999																		
Date Time Range:	07/01/2009 08:00:00 - 07/02/2009 17:00:00																		
Purpose Code Range:	0-3,5-8,10-9999																		
DNIS: 8002 Summary: DNIS Number of Calls: 1 Total Call Duration: :01:57 Avg. Duration: :01:57																			
<table border="1"> <thead> <tr> <th>Date Time ConnectedDate</th> <th>Caller Id RemoteNumberFMT</th> <th>Name RemoteName</th> <th>User LocalUserId</th> <th>Ext. LocalNumber</th> <th>Station Id StationId</th> <th>Call Duration CallDurationSeconds</th> <th>Hold Time HoldDurationSeconds</th> </tr> </thead> <tbody> <tr> <td>7/2/2009 11:35:45 AM</td> <td>8002</td> <td>John Doe</td> <td>John Smith</td> <td>-</td> <td>Johns PC</td> <td>:01:57</td> <td>:00:00</td> </tr> </tbody> </table>				Date Time ConnectedDate	Caller Id RemoteNumberFMT	Name RemoteName	User LocalUserId	Ext. LocalNumber	Station Id StationId	Call Duration CallDurationSeconds	Hold Time HoldDurationSeconds	7/2/2009 11:35:45 AM	8002	John Doe	John Smith	-	Johns PC	:01:57	:00:00
Date Time ConnectedDate	Caller Id RemoteNumberFMT	Name RemoteName	User LocalUserId	Ext. LocalNumber	Station Id StationId	Call Duration CallDurationSeconds	Hold Time HoldDurationSeconds												
7/2/2009 11:35:45 AM	8002	John Doe	John Smith	-	Johns PC	:01:57	:00:00												
DNIS: 8222 Summary: DNIS Number of Calls: 1 Total Call Duration: :00:08 Avg. Duration: :00:08																			
<table border="1"> <thead> <tr> <th>Date Time</th> <th>Caller Id</th> <th>Name</th> <th>User</th> <th>Ext.</th> <th>Station Id</th> <th>Call Duration</th> <th>Hold Time</th> </tr> </thead> <tbody> <tr> <td>7/1/2009 9:20:16 AM</td> <td>8222</td> <td>John Doe</td> <td>John Smith</td> <td>8222</td> <td>System</td> <td>:00:08</td> <td>:00:00</td> </tr> </tbody> </table>				Date Time	Caller Id	Name	User	Ext.	Station Id	Call Duration	Hold Time	7/1/2009 9:20:16 AM	8222	John Doe	John Smith	8222	System	:00:08	:00:00
Date Time	Caller Id	Name	User	Ext.	Station Id	Call Duration	Hold Time												
7/1/2009 9:20:16 AM	8222	John Doe	John Smith	8222	System	:00:08	:00:00												
DNIS: 8367 Summary: DNIS Number of Calls: 1 Total Call Duration: :00:11 Avg. Duration: :00:11																			
<table border="1"> <thead> <tr> <th>Date Time</th> <th>Caller Id</th> <th>Name</th> <th>User</th> <th>Ext.</th> <th>Station Id</th> <th>Call Duration</th> <th>Hold Time</th> </tr> </thead> <tbody> <tr> <td>7/1/2009 12:11:26 PM</td> <td>8367</td> <td>John Doe</td> <td>John Smith</td> <td>8367</td> <td>System</td> <td>:00:11</td> <td>:00:00</td> </tr> </tbody> </table>				Date Time	Caller Id	Name	User	Ext.	Station Id	Call Duration	Hold Time	7/1/2009 12:11:26 PM	8367	John Doe	John Smith	8367	System	:00:11	:00:00
Date Time	Caller Id	Name	User	Ext.	Station Id	Call Duration	Hold Time												
7/1/2009 12:11:26 PM	8367	John Doe	John Smith	8367	System	:00:11	:00:00												
Print Date: Interactive Intelligence, Inc. Page 1 of 1																			

2.3.16.

Example Reports

Agent Availability with Activation

Date Time Range: 09/23/2004 09:36:53 - 09/23/2004 15:36:53

Activity Time Range: 00:00:00 - 23:59:59

Site ID Range: 0-999

Agents /Workgroups: I-zzz

Site ID: 100

Agent: AARON.LERCH

		Flags				
		Logged In	Aod Logged In	Non Aod Logged In	DND	ACW
Agent Summary:			01:21:00	:01:52	01:55:59	:00:00

		Flags				
		Logged In	Aod Logged In	Non Aod Logged In	DND	ACW
9/23/2004	State	Duration	01:21:00	:01:52	01:55:59	:00:00
10:10:51AM	Working At Home	:00:00				
10:11:11AM	Working At Home	:00:00	◆			
10:11:11AM	Working At Home	:00:06	◆		◆	
10:11:17AM	Working Out	01:55:53	◆		◆	
12:07:10PM	Available	:34:16	◆	◆		
12:41:26PM	Available	:00:00				
12:41:37PM	Available	:46:44	◆	◆		
12:41:37PM	Available	:00:00	◆			
1:28:21PM	Available, Follow-Me	:01:52	◆	◆		

Agent Totals: 03:18:51

Agent: ANNE.ASSANTE

		Flags				
		Logged In	Aod Logged In	Non Aod Logged In	DND	ACW
Agent Summary:			:00:00	01:06:25	01:39:09	:00:00

		Flags				
		Logged In	Aod Logged In	Non Aod Logged In	DND	ACW
9/23/2004	State	Duration	:00:00	01:06:25	01:39:09	:00:00
10:26:14AM	Available, No ACD	01:06:25	◆	◆		
11:32:39AM	At Lunch	01:39:09	◆		◆	

Agent Totals: 02:45:34

Agent: ANNEB

		Flags				
		Logged In	Aod Logged In	Non Aod Logged In	DND	ACW
Agent Summary:			01:11:48	:00:00	01:16:01	:00:00

IVR Summary

Date Time Range: 10/12/2004 10:12:09 - 10/13/2004 10:12:09

Site ID Range: 0-999

Level : 4

Site ID : 100

Application :

	Calls Entered	% of Total Calls	Avg IVR Duration	Total Time	% of Total	Repeated Calls
Application :						
2004-10-12	254	41.78%	:00:05	:20:23	16.03%	0
2004-10-13	79	12.99%	:00:03	:04:28	3.51%	0
	333	54.77%	:00:04	:24:51	19.54%	0

Application : Error Handling

2004-10-13	1	0.16%	:00:00	:00:00	0.00%	0
Error Handling	1	0.16%	:00:00	:00:00	0.00%	0

Application : Extended Menu

2004-10-12	110	18.09%	:00:43	01:19:23	62.43%	1
2004-10-13	24	3.95%	:00:29	:11:33	9.08%	0
Extended Menu	134	22.04%	:00:41	01:30:56	71.52%	1

Site ID : 100 468 :00:15 01:55:47 1

Application :

2004-10-12	23	3.78%	:00:00	:00:06	0.08%	0
2004-10-13	1	0.16%	:00:15	:00:15	0.20%	0
	24	3.95%	:00:01	:00:21	0.28%	0

Application : Extended Menu

2004-10-12	97	15.95%	:00:06	:10:06	7.94%	1
2004-10-13	2	0.33%	:00:00	:00:00	0.00%	0
Extended Menu	99	16.28%	:00:06	:10:06	7.94%	1

Site ID : 101 123 :00:05 :10:27 1

Application :

IVR Exit Path

Date Time Range: 10/12/2004 10:10:11 - 10/13/2004 10:10:11

Site ID Range: 0-999

Level : 3

Site ID : 100

Menu/ Exit Path	Calls Exited	% of Calls	Avg IVR Duration	Total Time	% Time
-H-					
Workgroup Queue	31	91%	:00:00	:00:00	0.00%
Default Schedule					
Receive Fax	1	3%	:00:23	:00:23	43.40%
User Queue	2	6%	:00:15	:00:30	56.60%
	34		:00:02	:00:53	
Default Operator Profile Default Schedule					
Default Schedule					
Workgroup Queue	4	100%	:00:00	:00:00	0.00%
	4		:00:00	:00:00	
Default Profile Default Schedule					
Default Schedule					
Default Profile Default Schedule Default Schedule	6	3%	:00:38	:03:50	17.36%
EMS Customizations	54	30%	:00:05	:04:35	20.75%
Set User Availability	8	4%	:00:10	:01:23	6.26%
User Queue	114	63%	:00:06	:12:17	55.62%
	182		:00:07	:22:05	
Investor Relations Default Schedule					
Default Schedule					
Investor Relations	3	100%	:00:00	:00:00	0.00%
	3		:00:00	:00:00	
Marketing Default Schedule					
Default Schedule					

IVR Summary Abandoned Report

Date Time Range: 10/12/2004 10:11:21 - 10/13/2004 10:11:21

Site ID Range: 0-999

Level : 3

Site ID : 100

Application:

Date	Calls Entered	Calls Abandoned	Abandoned Duration	Percent Abandoned
Application :				
2004-10-12	25	0	:00:00	0.00%
2004-10-13	6	0	:00:00	0.00%
	31	0	:00:00	
Application : After Hours				
2004-10-12	1	1	:00:08	100.00%
2004-10-13	4	4	:00:53	100.00%
After Hours	5	5	:01:01	
Application : Default Schedule				
2004-10-12	489	298	03:19:06	63.54%
2004-10-13	145	111	:46:08	76.55%
Default Schedule	614	409	04:05:14	
Application : Error Handling: Default Schedule				
2004-10-13	1	1	:00:00	100.00%
Error Handling: Default Sched	1	1	:00:00	
Application : Marketing Closed				
2004-10-12	2	2	:00:10	100.00%
2004-10-13	2	2	:00:24	100.00%
Marketing Closed	4	4	:00:34	
Application : Support Open				
2004-10-12	29	2	:00:16	6.90%
2004-10-13	7	1	:00:16	14.29%
Support Open	36	3	:00:32	
Site ID : 100	691	422	04:07:21	61.07%
Application : Default Schedule				
2004-10-12	128	20	:12:42	15.63%
2004-10-13	28	25	:03:27	89.29%

Recorder Questionnaire Detail

Questionnaire Range or List : I-xxx;"-"
Group Name Range or List : I-xxx;"-"

Questionnaire			Question							
Min Score	Max Score	Max	Type	Min	Max	Enum Value	Enum Text	Question Weight	Answer Min	Answer Max
Name : Quality Monitoring										
Text : Agent obtain and/or verify customer information?										
0	22	0	True/False	0	0	1	True	1	0	0
			True/False	0	0	0	False	1	0	0
Text : Agent use appropriate greeting?										
0	22	0	True/False	0	0	1	True	1	0	0
			True/False	0	0	0	False	1	0	0
Text : How courteous was the agent?										
0	22	0	Multiple Choice	0	0	3	Very	2	0	0
			Multiple Choice	0	0	2	Good	2	0	0
			Multiple Choice	0	0	1	Acceptable	2	0	0
			Multiple Choice	0	0	0	Rude	2	0	0
Text : Agent at any point interrupt the customer?										
0	22	0	True/False	0	0	1	True	1	0	0
			True/False	0	0	0	False	1	0	0
Text : Agent clarify customer issue?										
0	22	0	True/False	0	0	2	True	3	0	0
			True/False	0	0	0	False	3	0	0
Text : Agent exhibit responsiveness toward the customer?										
0	22	0	Multiple Choice	0	0	2	Very responsive	1	0	0

Page 2 of 3

Recorder Scoring Detail

Questionnaire Range or List : I-xxx;"-"
User Range or List : I-xxx;"-"
Date /Time Range or List : 07/02/2004 16:49:25 - 09/02/2004 16:49:25

IC User	Questionnaire Name	Questionnaire Min Score	Questionnaire Max Score	Question Group	Question Text	Question Answer	Answer Score	Form Score
Title: Call recorded on 8/6/2004 Recording Date: 8/6/2004 8:18:44 PM Media: CALL								
JaneM	Intro 1	0	2	Part 1	Are you breathing?	True	1	1
				Part 2	Do you wish to continue breathing?	False	0	1
Title: Call recorded on 8/6/2004 Recording Date: 8/6/2004 8:46:00 PM Media: CALL								
JohnM	Intro 1	0	2	Part 1	Are you breathing?	True	1	1
				Part 2	Do you wish to continue breathing?	False	0	1
Title: Call recorded on 8/7/2004 Recording Date: 8/7/2004 1:46:43 PM Media: CALL								
JohnM	1	195	935	1	1	True	2	219
					2	6.000000	18	219
					3	46.000000	184	219
					4	e	15	219
	Intro 1	0	2	Part 1	Are you breathing?	True	1	2
				Part 2	Do you wish to continue breathing?	True	1	2
	Quality Monitoring		22	Greeting Skills	Agent use appropriate greeting?	True	1	19
					Agent obtain and/or verify customer information?	False	0	19
					How courteous was the agent?	Very	6	19
				Listening Skills	Agent focus on the call?	True	1	19
					Agent at any point interrupt the customer?	True	1	19
					Agent exhibit responsiveness toward the customer?	Responsive	1	19
					Agent clarify customer issue?	True	6	19

Page 1 of 6

Recorder Scoring Summary

Questionnaire Range or List : I-xxx,"-"
 User Range or List : I-xxx,"-"
 Date /Time Range or List : 07/02/2004 16:53:14 - 09/02/2004 16:53:14

Name	Question naire Min Score	Question naire Max Score	IC User	Title	Recording Date	Media	Score	Percentile	Rank
1									
	195	935	JohnM	Email recorded on 8/10/2004	8/10/2004 6:13:49 PM	EMAIL	200	0	Execute
	195	935	JohnM	E-mail recorded on 8/24/2004	8/24/2004 4:19:53 PM	EMAIL	206	1	Execute
	195	935	JohnM	Call recorded on 8/7/2004	8/7/2004 1:46:43 PM	CALL	219	3	Unknown
Intro 1									
	0	2	JaneM	Call recorded on 8/6/2004	8/6/2004 8:18:44 PM	CALL	1	50	Execute
	0	2	JaneM	Move This Recording	8/7/2004 1:19:32 PM	CALL	0	0	Execute
	0	2	JohnM	Call recorded on 8/7/2004	8/7/2004 1:47:17 PM	CALL	2	100	Excellent
	0	2	JohnM	Call recorded on 8/6/2004	8/6/2004 8:46:00 PM	CALL	1	50	Execute
	0	2	JohnM	Call recorded on 8/7/2004	8/7/2004 1:46:43 PM	CALL	2	100	Unknown
Quality Monitoring									
	0	22	JohnM	Call recorded on 8/7/2004	8/7/2004 1:46:43 PM	CALL	19	86	Good
	0	22	JohnM	Call recorded on 8/7/2004	8/7/2004 1:47:17 PM	CALL	22	100	Excellent

Agent Availability Detail

Date Time Range: 09/09/2004 15:25:37 - 09/23/2004 15:25:37

Activity Time Range: 00:00:00 - 23:59:59

Site ID Range: 100

Agents /Workgroups: Meredith.Egg

Site ID: 100

Agent: MEREDITH.EGG

		Flag				
		Logged In	Acd Logged In	Non Acd Logged In	DND	ACW
Agent Summary:			:00:00	51:14:27	116:02:43	:00:00

		Flag				
		Logged In	Acd Logged In	Non Acd Logged In	DND	ACW
9/9/2004	State	Duration	:00:00	01:01:21	07:07:06	:00:00

3:51:33PM	Away from desk	:00:07	◆		◆	
3:51:40PM	Available, No ACD	:02:40	◆	◆		
3:54:20PM	Away from desk	:02:59	◆		◆	
3:57:19PM	Available, No ACD	:50:29	◆	◆		
4:47:48PM	Away from desk	:03:23	◆		◆	
4:51:11PM	Available, No ACD	:08:12	◆	◆		
4:59:23PM	Gone Home	07:00:37	◆		◆	

		Flag				
		Logged In	Acd Logged In	Non Acd Logged In	DND	ACW
9/10/2004	State	Duration	:00:00	03:04:00	07:56:58	:00:00

12:00:00AM	Gone Home	07:08:33	◆		◆	
7:08:33AM	Available, No ACD	:32:57	◆	◆		
7:41:30AM	Away from desk	:00:02	◆		◆	
7:41:32AM	Available, WAH	:00:03	◆	◆		
7:41:35AM	Available, No ACD	:01:59	◆	◆		
7:43:34AM	Away from desk	:07:39	◆		◆	
7:51:13AM	Available, No ACD	:34:25	◆	◆		
8:25:38AM	Away from desk	:03:07	◆		◆	
8:28:45AM	Available, No ACD	01:23:52	◆	◆		
9:52:37AM	On a Conference Call	:25:03	◆		◆	
10:17:40AM	Available, No ACD	:29:13	◆	◆		
10:46:53AM	Away from desk	:11:49	◆		◆	
10:58:42AM	Available, No ACD	:01:31	◆	◆		
11:00:13AM	Gone Home	:00:45	◆		◆	
11:00:58AM	Gone Home	:00:00				

Agent Performance Detail for Queue by Interval

Date Time : 09/22/2004 15:30:44 - 09/23/2004 15:30:44

Shift : 00:00:00 - 23:59:59

Site ID : 0-999

Agents /Workgroups: !-zzz

Alan.Snyder	ACD									Non ACD					
	Ints	Avg Talk	Total Talk	Avg ACW	Total ACW	Avg Speed Ans	Local Disc	Load Ratio	Activated & Available	In	Avg In Talk	Total Time In	Out	Avg Out Talk	Total Time Out
9/22/2004															
Relationship Managers															
4:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:05				0		
4:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:22:56				0		
5:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:04:19				0		
5:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
6:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
6:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
7:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
7:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
8:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
8:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
9:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
9:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
10:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
10:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
11:00:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
11:30:00 PM	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00				0		
Relationship Managers	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:27:20	3	:01:14	:03:41	0	:00:00	:00:00

(Graph) Profile of Average Speed of Answer

Queue Range: l-zzz
 Date Time Range: 10/12/2004 10:13:35 - 10/13/2004 10:13:35
 Activity Time Range: 00:00:00 - 23:59:59
 Site ID Range: 0-999

Marketing	Interval	Minutes	(hh:mm:ss)
	12:00:00AM	0.00	:00:00
	12:30:00AM	0.00	:00:00
	1:00:00AM	0.00	:00:00
	1:30:00AM	0.00	:00:00
	2:00:00AM	0.00	:00:00
	2:30:00AM	0.00	:00:00
	3:00:00AM	0.00	:00:00
	3:30:00AM	0.00	:00:00
	6:00:00AM	0.00	:00:00
	6:30:00AM	0.00	:00:00
	7:00:00AM	41.79	:41:47
	7:30:00AM	0.03	:00:02
	8:00:00AM	0.05	:00:03
	8:30:00AM	0.02	:00:01
	9:00:00AM	0.11	:00:06
	9:30:00AM	0.06	:00:03
	10:30:00AM	0.14	:00:09
	11:00:00AM	0.00	:00:00
	11:30:00AM	0.09	:00:05
	12:00:00PM	0.20	:00:12
	12:30:00PM	0.13	:00:08
	1:00:00PM	0.09	:00:05
	1:30:00PM	0.00	:00:00
	2:00:00PM	0.10	:00:06
	2:30:00PM	0.03	:00:02
	3:00:00PM	0.06	:00:04

Page 38 of 54

Agent Availability Summary

From: 10/29/2001 12:00:00AM To: 11/7/2001 11:59:59PM
 Date Time Range: 10/29/2001 12:00:00AM 11/7/2001 11:59:59PM
 Activity Time Range: 12:00:00AM 11:59:59PM
 Site ID Range: 190 190
 Agents /Workgroups: TestEIC



INTERACTIVE INTELLIGENCE

Site ID:

Agent:

Flags

Logged In Acd Logged In Non Acd Logged In DND ACW

First Activity: Last Activity: Total Time:

State: Flags: Duration:

Flags

Logged In Acd Logged In Non Acd Logged In DND ACW

Account Code Call Detail by Date

Users: !
Date Time Range: 10/29/2001 12:00:00AM 11/5/2001 11:59:59PM
Account Code Range: - 999999999
Site ID Range: 0 9999



INTERACTIVE INTELLIGENCE

Account Code :
Customer Name:

Date: 10/30/2001

Time	User	In/Out	Remote Number	Remote Name	Call Duration	Hold Time
3:02:08PM	BobR	Outbound	(916) 356-2663	Folsom CA	01:44:36	:00:00
4:03:56PM	Alvin.Plahlko	Outbound	(317) 571-9470	Carmel IN	:08:22	:00:00
4:07:34PM	AIM	Outbound	N/A	JasonB	:05:36	:00:00
4:16:37PM	Brad.Wilson	Inbound	(317) 859-3994	Frank DellaRocco	:06:08	:00:13
4:16:59PM	BobbyW	Outbound	(800) 827-6364		:00:00	:00:00
4:17:12PM	BobbyW	Outbound	(888) 265-8003		:11:41	:00:00
4:21:59PM	Brad.Wilson	Inbound	(317) 418-8261	Indianapolis IN	:08:06	:00:15
4:22:03PM	BlIM	Inbound	N/A	108	:00:07	:00:00
4:22:15PM	BlIM	Inbound	N/A	108	:00:07	:00:00
4:22:30PM	BarbC	Inbound	N/A	Butler, Nick	:00:00	:00:06
4:25:46PM	Brad.Beer	Inbound	N/A	Alford, Jared	:00:03	:00:00
4:26:56PM	AndyN	Inbound	(812) 855-6795	Bloomington IN	:00:55	:00:00
4:30:03PM	AnneB	Inbound	(317) 578-6000	Fishers IN	:04:31	:00:06
4:30:12PM	Brad.Wilson	Inbound	(317) 843-8657	Carmel IN	:00:39	:00:00
4:34:26PM	ArtO	Inbound	(317) 773-1365	Art Overmyer	:00:19	:00:00
4:38:30PM	ArtO	Outbound	(317) 773-1365	Art Overmyer	:11:14	:00:00
4:38:47PM	Brad.Wilson	Outbound	(317) 888-0109	Greenwood IN	:00:25	:00:00
4:39:26PM	Brad.Wilson	Outbound	(317) 443-6696	Indianapolis IN	:00:08	:00:00
4:43:31PM	AnneB	Inbound	N/A	Probaia, Jason	:00:00	:00:06
4:43:50PM	Bob.Spearman	Inbound	(720) 979-7427	Denver CO	:00:14	:00:06
4:43:58PM	Alvin.Plahlko	Inbound	(317) 817-9386	Carmel IN	:00:54	:00:00
4:44:18PM	BobR	Inbound	(317) 758-9210	Bob Roaten	:00:21	:00:00
4:47:18PM	BobR	Outbound	(317) 758-9210	Bob Roaten	:01:18	:00:00
4:47:20PM	AIM	Inbound	(317) 704-6000	Indianapolis IN	:00:46	:00:00
4:51:30PM	AIM	Outbound	(317) 837-0603	Colin Fraizer	:13:14	:00:00
5:06:23PM	Alan.Snyder	Inbound	N/A	Pergal, Jeff	:00:20	:00:14
5:12:26PM	AIM	Inbound	N/A	Brown, Jason	:06:20	:00:00
5:12:32PM	Brian.Beasley	Inbound	(317) 679-8220	Indianapolis IN	:03:20	:00:06
5:20:28PM	Brad.Melchil	Inbound	(317) 715-8600	148	:02:56	:00:06
5:21:47PM	ArtO	Outbound	(317) 773-1365	Art Overmyer	:01:47	:00:00
5:21:48PM	Alvin.Plahlko	Outbound	(317) 923-5204	Indianapolis IN	:02:22	:00:00
5:23:34PM	BlIM	Inbound	N/A	Sherman, Cheri	:00:07	:00:00
5:25:11PM	BrianS	Inbound	(765) 534-3752	Lapel IN	:00:59	:00:06
5:32:07PM	AIM	Outbound	(617) 896-6302	Boston MA	:01:22	:00:00
5:34:23PM	AndyN	Inbound	(317) 843-2556	Andy Niksch	:00:34	:00:00
5:46:14PM	Bob.Jalale	Outbound	(317) 254-1255	Indianapolis IN	:00:23	:00:00
6:02:46PM	Brad.Melchil	Inbound	(502) 625-1605	Louisville KY	:00:13	:00:05
6:04:58PM	Brad.Beer	Inbound	N/A	Gerardot, Jeff	:04:09	:00:00
6:08:48PM	AnneB	Inbound	(317) 770-7083	Noblesville IN	:00:42	:00:06
6:13:51PM	Brad.Beer	Outbound	(317) 776-2344	Noblesville IN	:00:57	:00:00
6:17:58PM	Bob.Spearman	Inbound	(972) 966-0807	Rob Phillips	:04:34	:00:05
6:35:48PM	Adam.Shankel	Inbound	N/A	Essendrup, Kim	:00:01	:00:05
7:44:03PM	Brad.Melchil	Inbound	(317) 289-3180	(317) 289-3180	:00:29	:00:06
8:54:42PM	Brad.Melchil	Inbound	(317) 289-3180	(317) 289-3180	:01:58	:00:05
8:56:28PM	Brad.Melchil	Inbound	(502) 625-1034	Louisville KY	01:20:08	:00:06

Agent Performance Summary for Queue

From: 11/6/2001 12:00:00AM To: 11/7/2001 11:59:59PM
 Shift: 12:00:00AM 11:59:59PM
 Site ID: 0 9999
 Agents /Workgroups: !-zzz

	ACD									Non ACD					
	Ints	Avg Talk	Total Talk	Avg ACW	Total ACW	Avg Speed Ans	Local Disc	Load Ratio	Available	In	Avg In Talk	Total Time In	Out	Avg Out Talk	Total Time Out
Adam.Shankel															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00	1	:00:11	:00:11	0	:00:00	:00:00
Angela.Weiler															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00	3	:00:03	:00:03	5	:01:34	:07:48
Anita.Mower															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00	10	:00:21	:03:30	5	:01:18	:08:36
Anne.Assante															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00	2	:00:31	:01:02	12	:02:17	:27:18
AnneB															
Agent Summary	4	:04:48	:19:03	:01:33	:08:11	:00:09	4	0.75	08:02:37	1	:00:04	:00:04	7	:05:00	:36:03
BarbC															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:02	4	:00:63	:09:31	13	:05:09	01:07:01
BenL															
Agent Summary	0	:00:00	:00:00	:00:00	:00:00	:00:00	0	0.00	:00:00	0	:00:00	:00:00	3	:00:47	:02:20

Page 1 of 16

Queue Period Statistics Abandon Report

Queue Range: !-zzz
 Date Time Range: 11/23/2004 00:00:00 - 11/23/2004 23:59:59
 Shift Time Range: 00:00:00 - 23:59:59
 Site ID Range: 0-999

	Ints Offered	Ints Answered	Ints Aband	Service Thres holds						Avg Aband Time	Local Disc.
				< 10	< 20	< 30	< 40	< 50	< 60		
SiteID: 201											
CompanyOperator											
11/23/2004	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	:00:00	0
CompanyOperator											
Development	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	:00:00	0
11/23/2004	0	0	0	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	:00:00	0
Marketing											
11/23/2004	20	19	1	0.00%	0.00%	0.00%	0.00%	5.00%	0.00%	:00:46	19
Marketing	20	19	1	0.00%	0.00%	0.00%	0.00%	5.00%	0.00%	:00:46	19
SiteID: 201	20	19	1	0.00%	0.00%	0.00%	0.00%	5.00%	0.00%	:00:46	19
Grand Total:	20	19	1	0.00%	0.00%	0.00%	0.00%	5.00%	0.00%	:00:46	19

DNIS Detail Report

DNIS Range:
From: 0
To: 999999999

Date Time Range:
From: 11/5/2001 12:00:00AM
To: 11/7/2001 11:59:59PM

Site ID Range:
From: 0
To: 9999

DNIS: 0

Summary: DNIS Number of Calls: 6

Total Call Duration : :06:10

Avg. Duration : :01:01

Date	Call Id	Name	User	Ext.	Station Id	Call Duration	Hold Time
11/5/2001 09:12:36AM	N/A	Unknown Name	ScottJ	8303	System	:02:28	:00:30
11/6/2001 12:46:22PM	(317) 872-3000	Interactive Intelligence	MikeG	103	System	:01:22	:00:10
11/7/2001 09:28:20AM	N/A	Unknown Name	JasonT	8346	System	:00:11	:00:00
11/7/2001 10:11:51AM	N/A	Unknown Name	MikeG	103	System	:00:45	:00:00
11/7/2001 10:12:08AM	N/A	Unknown Name	MikeG	103	System	:00:27	:00:00
11/7/2001 10:59:26AM	(317) 872-3000	Interactive Intelligence	Operator	0	RECEPTIONP	:00:57	:00:00

DNIS: 103

Summary: DNIS Number of Calls: 25

Total Call Duration : :09:19

Avg. Duration : :00:22

Date	Call Id	Name	User	Ext.	Station Id	Call Duration	Hold Time
11/5/2001 08:53:41AM	(317) 872-3000	Interactive Intelligence	103		System	:00:34	:00:00
11/5/2001 09:25:53AM	(317) 872-3000	Interactive Intelligence	103		System	:00:29	:00:00
11/6/2001 10:23:58AM	(317) 872-3000	Interactive Intelligence	103		System	:00:03	:00:00
11/6/2001 12:45:27PM	(317) 872-3000	Interactive Intelligence	103		System	:00:16	:00:00
11/6/2001 12:46:06PM	(317) 872-3000	Interactive Intelligence	103		System	:01:38	:00:00
11/6/2001 12:47:11PM	(317) 872-3000	Interactive Intelligence	103		System	:00:33	:00:00
11/6/2001 02:35:01PM	(317) 872-3000	Interactive Intelligence	103		System	:01:23	:00:00
11/7/2001 10:11:44AM	(317) 872-3000	Interactive Intelligence	103		System	:00:52	:00:00
11/7/2001 10:11:53AM	(317) 872-3000	Interactive Intelligence	103		System	:00:43	:00:00
11/7/2001 10:12:12AM	(317) 872-3000	Interactive Intelligence	103		System	:00:26	:00:00
11/7/2001 10:12:50AM	(317) 872-3000	Interactive Intelligence	103		System	:00:29	:00:00
11/7/2001 10:18:45AM	(317) 872-3000	Interactive Intelligence	103		System	:00:24	:00:00
11/7/2001 10:20:22AM	(317) 872-3000	Interactive Intelligence	103		System	:00:18	:00:00
11/7/2001 10:22:27AM	(317) 872-3000	Interactive Intelligence	103		System	:00:08	:00:00
11/7/2001 10:23:25AM	(317) 872-3000	Interactive Intelligence	103		System	:00:04	:00:00
11/7/2001 10:24:14AM	(317) 872-3000	Interactive Intelligence	103		System	:00:04	:00:00

Distribution Queue Performance (Queue by Date)

Queue Range: !-zzz
Date Time Range: 11/07/2001 00:00:00 - 11/07/2001 23:59:59
Shift Time Range: 00:00:00 - 23:59:59
Site ID Range: 0-999

	Ints Ans	Avg Talk	Total Talk	Avg ACW	Total ACW	Ints Aban	Avg Aban	% Aband	Max Wait Ans	Avg Wait Ans	Svc Lvl1%	Load Ratio
SiteID: 3												
Support	125	:09:24	19:35:57	:01:46	03:40:32	8	:03:05	5.80%	01:39:06	:21:30	16.80%	0.84
Support_Overflow												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Support_Overflow	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Technical Sales												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Technical Sales	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
SiteID: 3	125	:09:24	19:35:57	:01:46	03:40:32	8	:03:05	6.87%	01:39:06	:21:30	16.80%	0.84
SiteID: 202												
Admin												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Admin	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Central Services												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
Central Services	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
ClientServices												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
ClientServices	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
CompanyOperator												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
CompanyOperator	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00
ConferenceBridge												
11/7/2001	0	:00:00	:00:00	:00:00	:00:00	0	:00:00	0.00%	:00:00	:00:00	0.00%	0.00

(Graph) Area Code

Country Codes: 1 To: 9999
 Date Times: 11/6/2001 12:00:00AM To: 11/7/2001 11:59:59PM
 Site ID Range: 0 To: 9999
 Area Code: 0 To: 999999999

Country Code	Area Code	Total Duration hh:mm:ss	Total Calls	Avg. Duration hh:mm:ss
1	201	:02:04	2	:01:02
1	203	03:36:47	33	:06:34
1	205	:32:30	5	:06:30
1	206	:14:56	2	:07:28
1	207	:14:27	1	:14:27
1	212	:21:04	4	:05:16
1	213	:00:19	1	:00:19
1	214	:39:17	11	:03:34
1	215	:04:51	2	:02:26
1	216	:00:42	1	:00:42
1	219	:21:24	27	:00:48
1	250	:04:05	2	:02:03
1	253	:01:53	2	:00:57
1	262	03:18:06	13	:15:14
1	301	:02:55	1	:02:55
1	303	05:46:07	27	:12:49
1	305	20:30:42	119	:10:21
1	306	:00:49	1	:00:49
1	310	09:07:27	48	:11:24
1	312	02:48:27	29	:05:49
1	313	:01:31	1	:01:31
1	314	03:24:34	22	:09:18
1	317	68:58:26	1,420	:02:55

Page 1 of 8

(Graph) Area Code

Country Codes: 1 To: 9999
 Date Times: 11/6/2001 12:00:00AM To: 11/7/2001 11:59:59PM
 Site ID Range: 0 To: 9999
 Area Code: 0 To: 999999999

Number of Codes

Code Frequency



Page 8 of 8

2.4. Interaction Center Feedback

2.4.1.CFI Group's Top 10 Customer Satisfaction

- Use a scientific questionnaire design
- Define the goal
- Keep surveys short and sweet
- Measure what matters
- Use the right scale
- Don't strive for a benchmark – find the "rightmark"
- Coordinate with IT
- Don't use survey results to evaluate individuals
- Report often and make results accessible
- If you've invested, make it work

2.4.2.Types of surveys

Automated post-call surveys: For inbound interactions that involve a live agent in a workgroup queue. The Interaction Feedback survey module in IC Business Manager lets survey authors (typically contact center and other business operations users) create and manage surveys without involving technical or programming resources. From the same module, users can also access survey results. Business users can quickly adapt surveys to changing business needs with a flexible, intuitive interface and wizard-driven survey creation process. Features like pre-defined templates, context menus, "copy" capability and the ability to organize surveys by team or business need help increase the speed and ease of survey creation.

2.4.3.Creating Surveys

Item	Description
Survey Group	Allows similar surveys to be put under a user-defined heading. For example, an organization might want to put all of its Customer Service surveys under one survey group, and all Marketing surveys in another.
Survey Settings	A wizard-driven process quickly guides the user through the set-up of new a new survey, including selection of required and optional settings specific to that survey.
Automatically Record Calls	Customers with Interaction Recorder can select a setting to automatically record interactions for calls where participants "opt-in" to a survey, ensuring call recordings will be available for review if indicated as necessary by survey scores.
Minimum Acceptable Score	Users can configure a setting to configure alerts in Interaction Supervisor to notify appropriate personnel when a completed survey score falls below this threshold.
Rank Group	Rank Group is the grading scale that is used for a Survey. The same Rank Groups are shared between Interaction Feedback and Interaction Recorder, to provide a consistent basis for comparison between internal and external (customer) perceptions of performance for a given interaction. Users may define as many different Rank Groups as they like, however each Survey can have only one Rank Group associated with it. The Survey Scoring Reports will display satisfaction ranking results for an individual agent or groups of agents. The Satisfaction vs. Quality Report will provide comparisons data for satisfaction vs. quality scores for an agent or a group of agents. The

	consistent ranking calibration between agent performance improvement and customer satisfaction available in CIC's all-in-one platform enables organizations to link Quality with the Voice of the Customer, and better support coaching or evaluation efforts.
Rule Conditions	Different organizations may have very different business requirements for surveying customers. Yet often, existing "bolt-on" (or even custom) solutions offer only limited options for survey call selection. To offer more flexibility, Interaction Feedback allows multiple rule conditions for each survey. A rule condition is a set of criteria that Interaction Feedback evaluates to determine if a call should receive a survey invitation. Because Interaction Feedback is tightly integrated to the Interaction Center platform, a user can define custom attributes of a call to survey, such as the results of a database lookup, and use those attributes to trigger a survey invitation. Configurable selections allow survey authors to define which calls receive a survey invitation and under what conditions based on parameters such as: • Workgroup • ANI • DNIS • Every nth call (frequency) • Maximum number of surveys per day • Day, Date, Time selections • Call attribute
Survey Prompts	Users can specify "general" survey prompts to be used for things like the survey invitation that asks a caller to participate, or a confirmation of that caller's "opt-in" that thanks them and reminds them to stay on the line following their interaction. Pre-configured prompts are available, or users can create custom prompts by: • Uploading pre-recorded .wav files • Recording through the handset • Using Text-To-Speech (TTS)
Questions	Questions are the building blocks for Surveys, and what Interaction Feedback's entire scoring system is built around. The name actually refers to the type of question response, which can be a True/False statement, numeric scale, or multiple choice. Each Question is assigned a number of possible answers, and a score is assigned to each answer. Weights can also be assigned to a question. Question Types: • Multiple Choice • Numeric • True/False (yes/no) • Free-form comments
Question Prompts	Each Question will have its own prompt that plays for the caller. Like the general Survey prompts, Question Prompts can be uploaded as pre-recorded .wav files (including professionally recorded prompts), recorded through the handset, or Text-To-Speech (TTS).

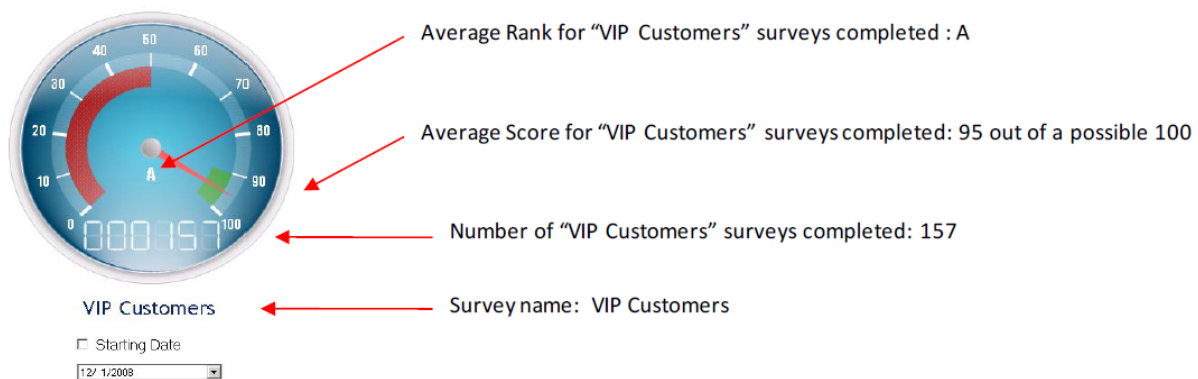
Question Categories	Survey Questions can be grouped in Categories, to allow organizations to identify how customers evaluate them on key “drivers” of satisfaction or desired future behaviors.
Free-form (Recorded) Comments	Customer comments are often where “dissatisfiers” (factors that contribute to customer attrition) are revealed. Interaction Feedback enables organizations to offer survey participants the opportunity to record their “free-form” comments. These recorded comments are managed by Interaction Feedback and accessible for playback, along with survey questions and responses, in the Survey Results.
Scoring and weighting	Users can configure scoring and optional weighting selections for each question response for a survey. The system will calculate an overall score for a Survey based on the scoring and weighting for each survey Question. Each Question can be weighted so that its score contributes more or less to the overall score of the Survey to which it belongs.

2.4.4.Survey Results

Part of the value of Interaction Feedback surveys will be the immediacy of access to survey results.

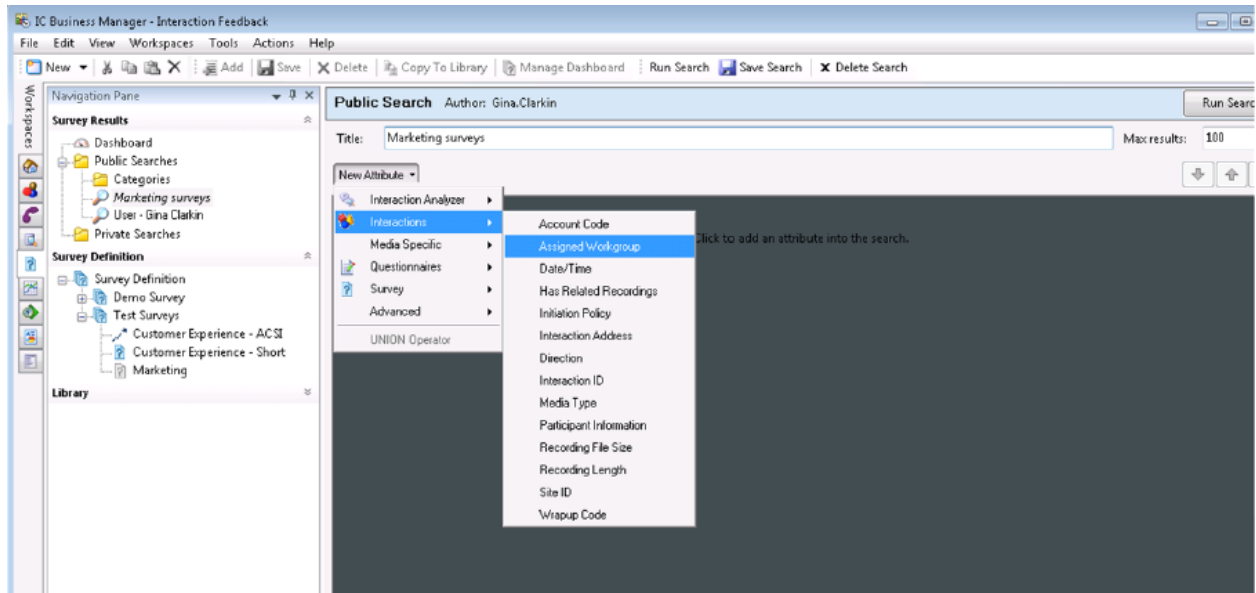
- **Dashboards**

Dashboards provide a “heads-up” display view for at-a-glance information about a particular survey, by date: average score for a survey, by overall ranking, and number completed. Based upon the configured rankings for a particular survey, dashboards display red “danger” zones, and green “ideal” zones.

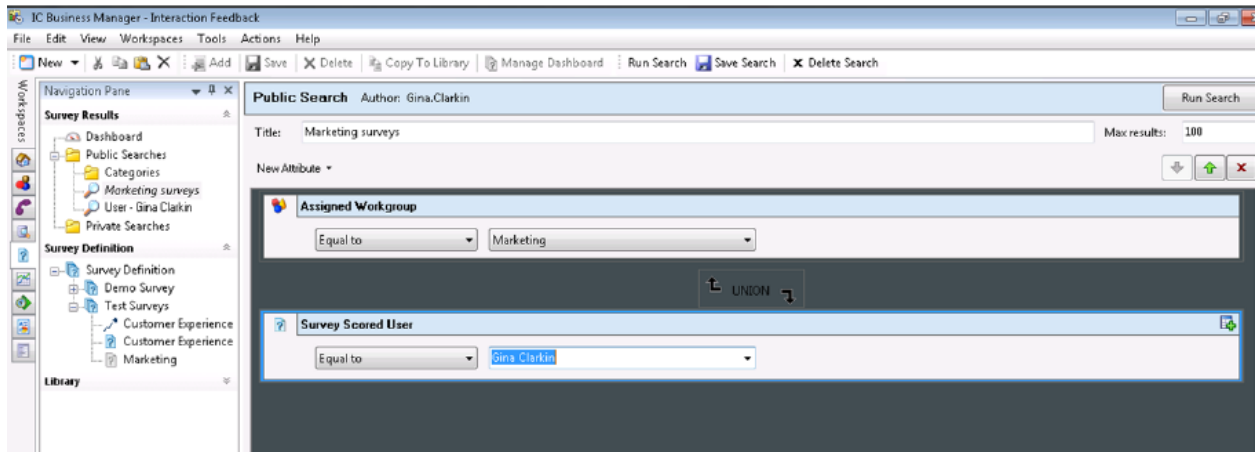


- **Search**

From the Interaction Feedback Client interface, authorized users will be able to search and view survey results. Users will have the ability to quickly configure “nested” searches, using compound attributes, to quickly access the desired information, without having to use complex query logic. For example, someone might want to search by survey name, for a particular agent, within a certain date range.



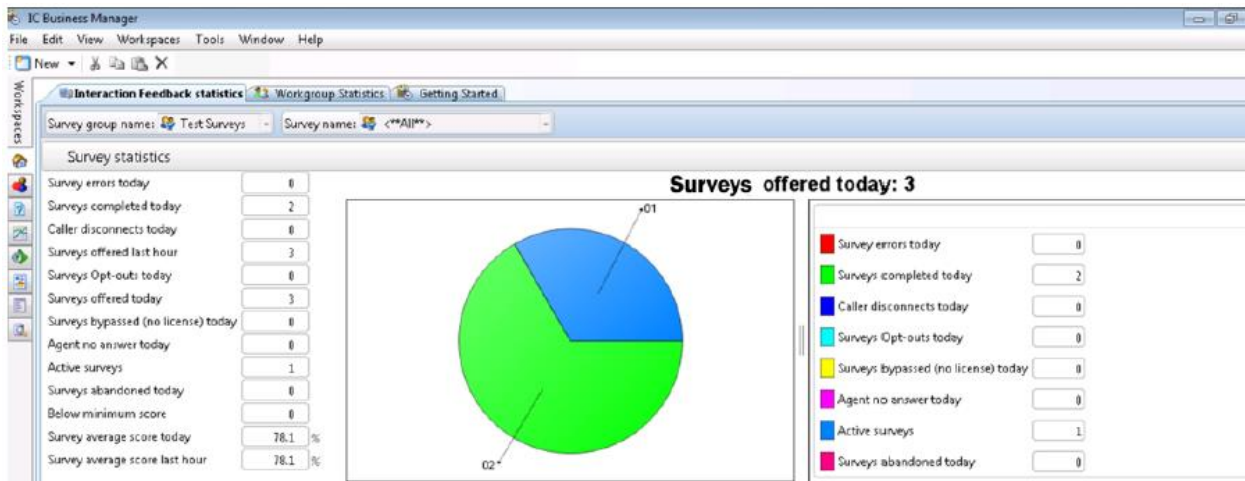
Results search attributes



- Monitoring**

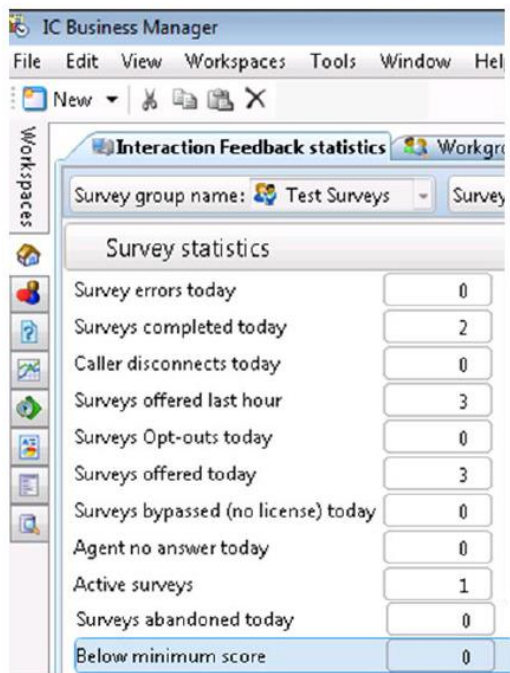
Supervisors can monitor survey activity to see real-time statistics by survey that can include:

- Surveys offered last hour
- Surveys offered today
- Active surveys (in-process)
- Completed surveys
- Abandoned surveys
- Surveys where callers opted-out
- Surveys with scores below "minimum acceptable score"



Alerts

Survey best practices underscore the importance of timing for survey delivery. Recommendations are that in order to increase results accuracy, a survey should be offered as close to the conclusion of the interaction as possible. But equally important is timing relative to the speed at which an organization can respond to customer issues. Interaction Feedback offers real-time alerts that can be configured to trigger based on a survey score or any other available Interaction Supervisor survey statistic. For example, survey scores that fall below a "minimum acceptable score," real-time alerts can be set to notify appropriate personnel (a Supervisor or "Customer Retention Specialist," for example), prompting proactive approaches to address issues before they escalate past the "point of no return."



Alerts

Sends an email to one or more recipients

☒ Send an email on entering the condition

☐ Send an email on exiting the condition

☐ Send an email when alert changes

☐ Send an email when the statistic value changes within the condition range

Email recipients:

jane.smith@inin.com

OK Cancel

3. Workforce Solutions

3.1. Interaction Optimizer

3.1.1. Scheduling Process

- **Schedule Process Distinct Phases:**

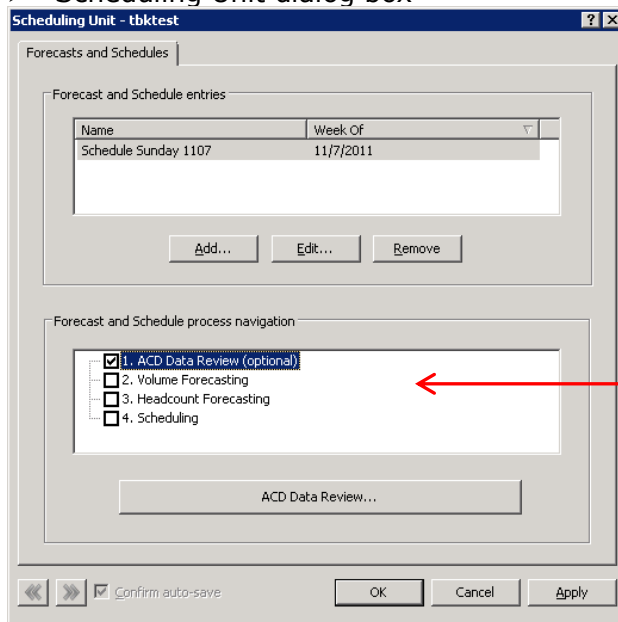
- Volume Forecasting — Interaction Optimizer calculates the number of interactions per route group per time slice based on historical ACD data and the individual weights applied to the days of the previous week(s). Administrators can manually adjust the volume forecast after it is generated, as necessary.
- Headcount Forecasting — The schedule administrator determines which headcount forecast method to use (Erlang-C or ACD simulation). Interaction Optimizer uses the selected method and the volume forecast to arrive at the number of CSRs is required to cover the predicted contact load at the requested service level.
- Schedule Generation — Interaction Optimizer uses the headcount forecast along with the weekly and daily shift definitions (and associated constraints and activities), CSR's constraints and activities, and accepted time off requests to arrive at a generated schedule.
- Schedule Administration — Schedule administrator alters the generated schedule in Interaction Optimizer Administration as necessary, and publishes it from there to the CSRs. For more information, see the Interaction Optimizer Administration online help.

- **Scheduling Procedure**

- Select a scheduling unit.
- Review the ACD data.
- Forecast volume.
- Forecast headcount.
- Generate an initial schedule.
- Adjust the schedule.
- Publish the schedule.

- **Process Navigation**

- Scheduling Unit dialog box



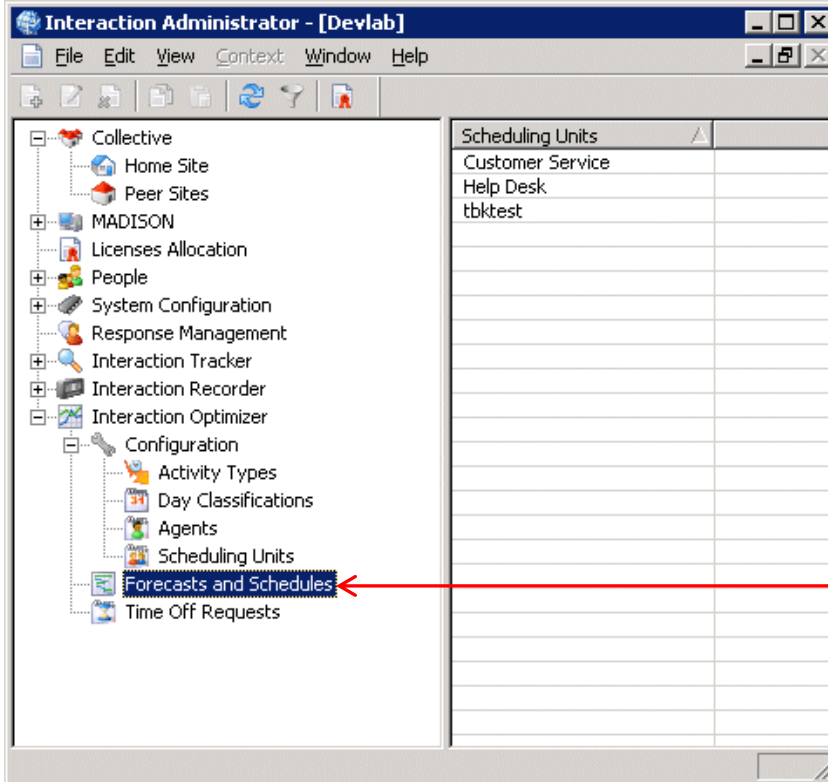
1. ACD Data Review (Optional)
2. Volume Forecasting
3. Headcount Forecasting
4. Scheduling

***Notes:**

- **The wide button toward the bottom of the Forecasts and Schedules tab changes text as Workforce move through the scheduling process.**
- **Double click each numbered step in the navigation list — or the button — as Workforce performs each step.**
- **Use the process navigation check boxes as a reference for tracking their progress in the schedule creation process. Check them when they are done with a step; leave unchecked the steps Workforce have not yet completed.**

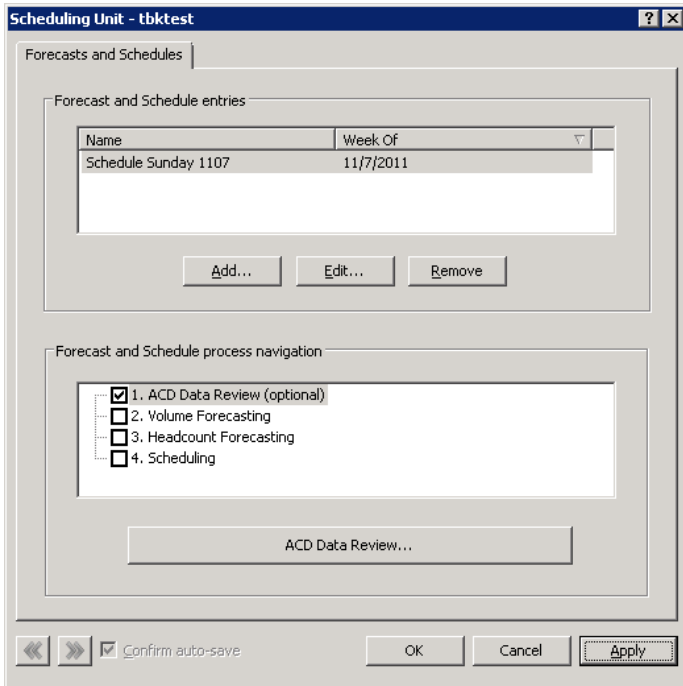
- **Select a Scheduling Unit**

1. In Interaction Administrator, expand the Interaction Optimizer container and select the Forecasts and Schedules container. All the scheduling units configured in the Scheduling Units sub-container that Workforce has the rights to view appear.

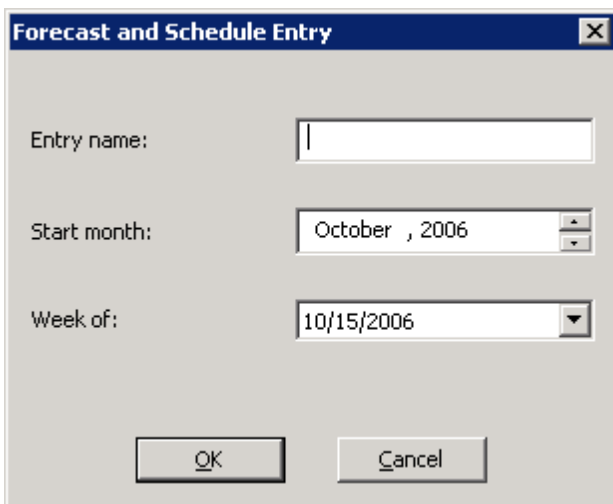


Forecast and Schedule

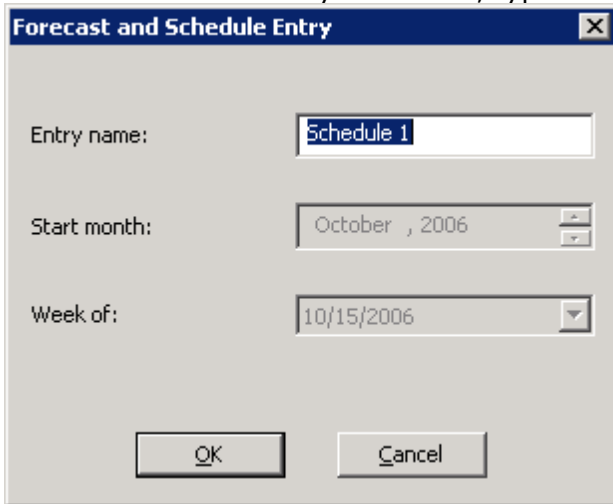
2. Do one of the following to select the scheduling unit for which to create a schedule. The Forecast and Schedules dialog appears for the selected scheduling unit. All previous schedule units setup by Workforce will appear under the Forecast and Schedules entry list.
 - Double-click a scheduling unit.
 - Right-click a scheduling unit and select Properties.



3. To create a new schedule, click Add. In the Entry name box, type a name for the new forecast and schedule entry. Optionally, select a different month in the Start month box and starting date in the Week of box. Click OK.

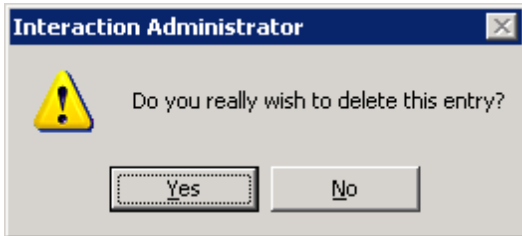


4. To change the name of an existing forecast and schedule entry, select an entry and click Edit. In the Entry name box, type a new name for the entry and click OK.



The dialog box titled "Forecast and Schedule Entry" contains three input fields: "Entry name:" with the text "Schedule 1", "Start month:" with a dropdown menu showing "October , 2006", and "Week of:" with a dropdown menu showing "10/15/2006". At the bottom are "OK" and "Cancel" buttons.

5. To delete an existing forecast and schedule entry, select an entry name and click Remove. In the Interaction Administrator message dialog box, click Yes.



The dialog box titled "Interaction Administrator" features a yellow warning icon and the text "Do you really wish to delete this entry?". It has "Yes" and "No" buttons at the bottom.

6. In the Forecasts and Schedule entries section, select the name of a schedule and click OK.
7. Continue with the Review ACD data (optional) section.

3.1.2. Volume Forecasting

Interaction Optimizer uses historical ACD data to calculate forecasted interaction volume for the coming week. Data is read from the ACD queues (IWrkgrpQueueStats table) by route group (see definition below). This data is automatically read by Interaction Optimizer during the Volume Forecast generation process.

Review ACD Data

- After Workforce selects a scheduling unit and either created a new forecast and schedule entry or selected an existing forecast and schedule entry (see Select a Scheduling Unit procedure), in the Forecast and Schedule process navigation section, do one of the following:
 - Double-click the 1. ACD Data Review (optional) step.
 - Select the 1. ACD Data Review (optional) step in the Forecast and Schedule Process Navigation section and click the ACD Data Review...button or double-click the ACD Data Review entry.

	Workgroup	Media Type	Skill Set	Offered	Completed	Avg. Talk Time	Avg. ACW Time
12:00 AM	Client Server Appli	Call	Operating Systems	6	3	00:01:59	00:02:31
12:30 AM	Email	Email	Web InterfacesEng	1	0	00:00:00	00:00:00
1:00 AM	Client Server Appli	Call	Web InterfacesEng	9	4	00:04:40	00:05:57
1:30 AM	Email	Email	Accounting Produc	0	0	00:00:00	00:00:00
2:00 AM	Client Server Appli	Call	Operating Systems	7	6	00:01:16	00:07:59
3:00 AM	Mainframe Applicati	Call	Operating Systems	1	0	00:00:00	00:00:00
3:30 AM	Client Server Appli	Call	Web InterfacesEng	9	4	00:08:46	00:09:41
4:00 AM	Client Server Appli	Call	Web InterfacesEng	6	3	00:09:56	00:07:47
6:30 AM	Client Server Appli	Call	Operating Systems	6	5	00:02:06	00:03:59
7:30 AM	Client Server Appli	Call	Web InterfacesEng	9	2	00:05:03	00:09:02
8:00 AM	Email	Email	Operating Systems	0	0	00:00:00	00:00:00
10:30 AM	Client Server Appli	Call	Operating Systems	11	4	00:02:20	00:06:15
11:00 AM	Email	Email	Web InterfacesEng	2	1	00:10:08	00:02:24

- Review the data by doing any or all of the following:
 - Use the arrows on the top left of the screen to scroll by day (the inner directional arrows), or by week (the outer directional arrows).
 - Click the arrow at the end of the Selected date drop-down list to display a calendar which enables Workforce to pick a date within the range of historical data.
- In the ACD Data Details dialog box, in the Day classification section, click the Modify button to edit the day classification of the currently displayed day.

***Note:** These day classifications are configured in the Day Classifications sub-container in the Interaction Optimizer container. The day classification configuration controls which day classifications are available for the currently selected day. See the Day Classification

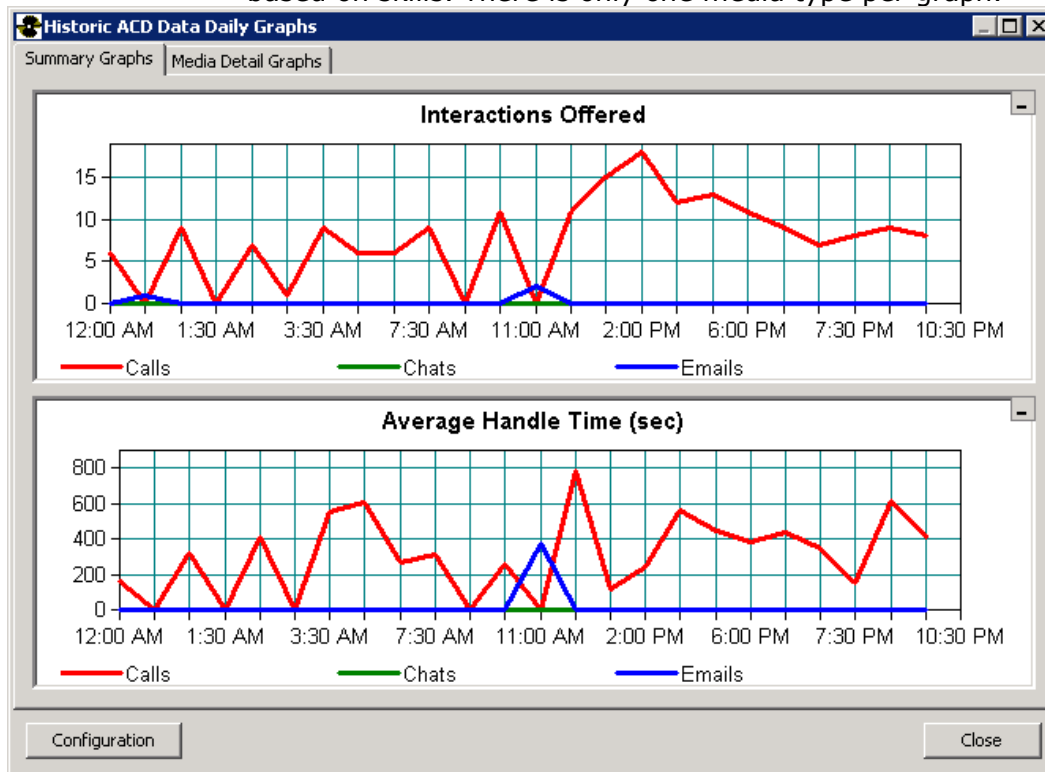
configuration in the Interaction Optimizer container in Interaction Administrator online help for more details.

4. In the ACD Data Details dialog box, click the Graph button to display several graphs pertinent to the ACD data. After Workforce completes their review of the graphs, click Close.

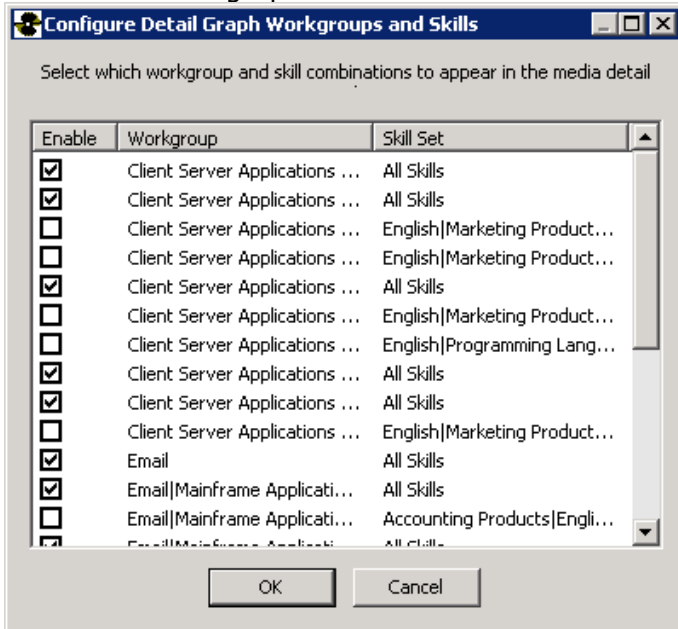
***Note: The Historic ACD Data Daily Graphs dialog box is a data review screen; none of the data displayed on it can be edited. Workforce can select a different graph by selecting a tab in the Historic ACD Data Daily Graphs dialog box.**

- **Available Graphs:**

- **Summary Graphs.** The Interactions Offered graph shows the time and number of interactions (calls, chats, and emails) that were offered. The Average Handle Time (sec) graph shows the time and handled time in average seconds of interactions (calls, chats, and emails) received.
- **Media Detail Graphs.** These graphs show the calls, chats and emails offered by time based on skills. There is only one media type per graph.



5. In the Historic ACD Data Daily Graphs dialog box, click the Configuration button to change the workgroup(s) and skill set(s) displayed on these graphs. Click OK to display the changes to the graphs.



6. When Workforce completes the ACD Data Review, in the ACD Data Details dialog box, click OK.
7. In the Scheduling Unit dialog box, select the checkbox next to 1. ACD Data Review and click Apply.

***Note: This step commits all the SQL which, up to clicking this button, is a transaction. Continue with the following**

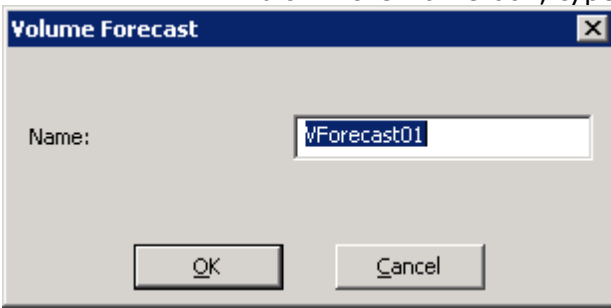
- **Select and weight days used in the volume forecast:**

1. In the Scheduling Unit dialog box, in the Forecast and Schedule Process Navigation section, do one of the following:
 - Double-click the 2. Volume Forecasting step.
 - Select the 2. Volume Forecasting step and click the Volume Forecasting button.

2. In the Volume Forecasts section, do one of the following:

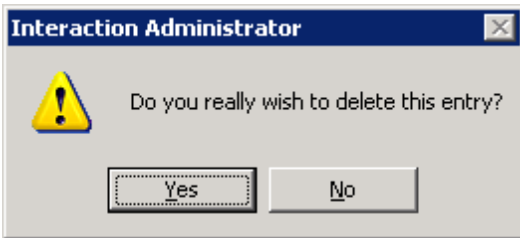
- To create a new volume forecast, click Add. In the Name box, type a name for the new volume forecast and click OK.

- To change the name of an existing volume forecast, select a forecast name and click Edit. In the Name box, type a new name for the existing forecast. Click OK.



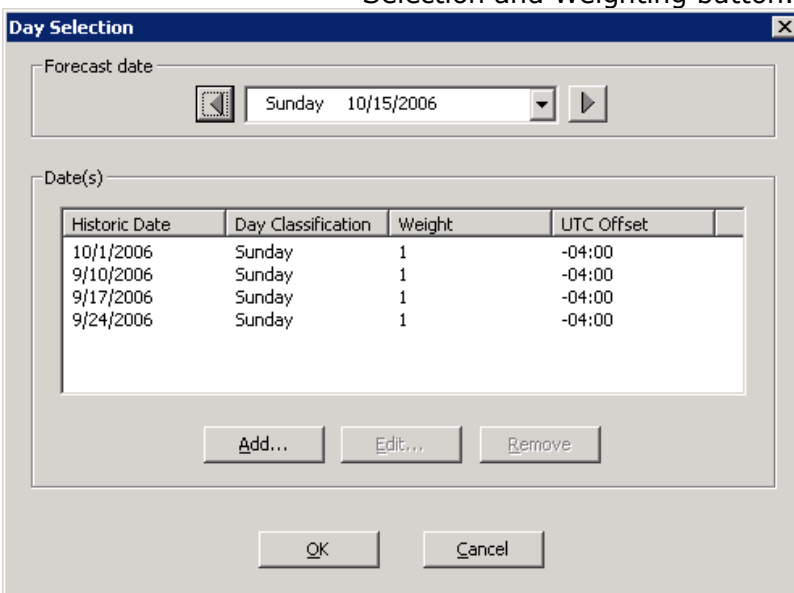
A dialog box titled "Volume Forecast" with a close button (X) in the top right corner. It contains a label "Name:" followed by a text input field containing "VForecast01". Below the input field are two buttons: "OK" and "Cancel".

- To delete an existing volume forecast, select a forecast name and click Remove. In the Interaction Administrator message dialog box, click Yes.



A dialog box titled "Interaction Administrator" with a close button (X) in the top right corner. It features a yellow warning triangle icon on the left. The text "Do you really wish to delete this entry?" is centered. At the bottom are two buttons: "Yes" and "No".

3. In the Volume Forecasts entries section, select the name of a volume forecast and does one of the following:
 - To accept default day selection and weighting, skip the rest of this procedure and go to the Volume forecast generation and modification section.
 - To adjust the day selection and weighting used for volume forecasting, do one of the following:
 - Double-click the Day selection and Weighting (optional) step.
 - Select the Day selection and Weighting (optional) checkbox and click the Day Selection and Weighting button.



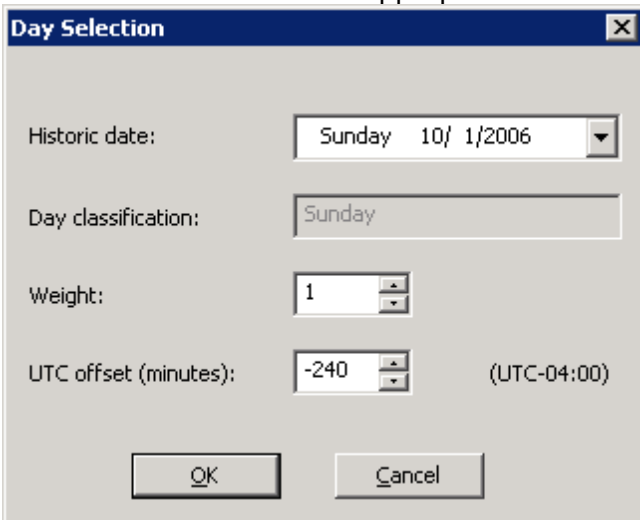
A dialog box titled "Day Selection" with a close button (X) in the top right corner. It has a "Forecast date" section with a calendar icon, a dropdown menu showing "Sunday 10/15/2006", and a right arrow button. Below this is a "Date(s)" section containing a table with four columns: "Historic Date", "Day Classification", "Weight", and "UTC Offset". The table lists four rows of data for Sunday. At the bottom of the table are three buttons: "Add...", "Edit...", and "Remove". At the very bottom of the dialog are "OK" and "Cancel" buttons.

Historic Date	Day Classification	Weight	UTC Offset
10/1/2006	Sunday	1	-04:00
9/10/2006	Sunday	1	-04:00
9/17/2006	Sunday	1	-04:00
9/24/2006	Sunday	1	-04:00

- **Understanding the Day Selection dialog**

- The Dates(s) list shows the historic dates for the selected day of the week corresponding to the date selected in Forecast date.

- The number of rows in the Dates(s) list is controlled by the Weeks of ACD data to import for forecasting settings in the Miscellaneous Scheduling Unit Configuration tab of the Scheduling Unit dialog box. See the Scheduling Unit configuration in the Interaction Optimizer container in Interaction Administrator online help for more details.
 - The Day Classification column displays the day classification assigned to this particular ACD data date. A special day classification such as Catalog Release Date acts as a reminder that Workforce may want to adjust the Weight assigned to this date.
 - The Weight column indicates the relative importance Workforce wants to place on the particular date of historical ACD data.
 - The UTC Offset column displays the offset from Coordinated Universal Time (UTC). Time zones around the world are expressed as positive or negative offsets from UTC. Since the historic ACD data is stored in local time, a UTC offset must be specified so that the volume forecast times can be stored in UTC. By default, the UTC offset is the IC server's current UTC offset.
- **Adjusting Historic Date values**
 - Workforce can add, edit or remove a historic date according to the qualitative information they possess about a given day's interactions. Perform any or all of the following steps in the Day Selection dialog box:
 - To include a historic date outside the date range, click the Add button. Add the appropriate values and click OK.



The Day Selection dialog box contains the following fields and controls:

- Historic date:** A dropdown menu showing "Sunday 10/ 1/2006".
- Day classification:** A text field containing "Sunday".
- Weight:** A spinner control set to "1".
- UTC offset (minutes):** A spinner control set to "-240", with "(UTC-04:00)" displayed to its right.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

Historic date	Dropdown List
Day classification	The Day Classification defaults from the ACD data and cannot be modified here. Workforce can assign special day classifications during ACD Data Review in the Desired Day Classification dialog box (see the dialog box in the Review ACD data section).
Weight	This integer value assigns the relative weight to the selected day's interaction volume data when arriving at next week's interaction volume. Example: If Workforce assigns a weight of "2", to Monday, 7/24/2006, and leave the other days' data as "1", this indicates that this historic day's data is counted double in the data used to average

	interaction volume for all the Mondays in the historic data to arrive at the average interaction volume predicted for the coming week's schedule. Note: In order to reduce the relative weight placed on a given day's interaction data, since this value is an integer and cannot be less than 1, increase the weights of all the other historic days' data. For example, to lower the weight of Monday, 7/24/2006 to 1/2, leave the record Workforce wants reduced at "1" and set the others to "2". Or, it may be easier to remove this day's date from the averaging formula entirely by selecting the record in the Day Selection dialog box and clicking Remove.
UTC offset (minutes)	UTC stands for Coordinated Universal Time which is the international time standard also known as Greenwich Mean Time. This value, in minutes, is used to account for differences on the given days' time. Use this value to make manual adjustments for Daylight Savings Time which may have either gone into or out of effect in the middle of the historical data's time period.

- To edit a date, select a row and click the Edit button, or double click on a highlighted row. Edit the available values and click OK.

***Note: Workforce can edit the Weight and UTC Offset in minutes, but they cannot edit the Historic date or Day classification.**

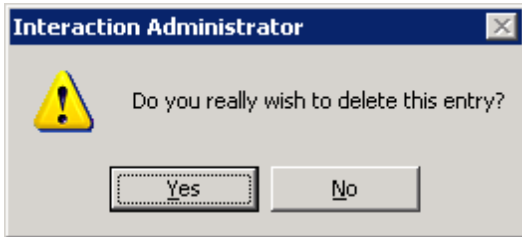
The image shows a 'Day Selection' dialog box with the following fields and values:

- Historic date: 7/24/2006
- Day classification: Monday
- Weight: 1
- UTC offset (minutes): -240 (UTC-04:00)

At the bottom, there are 'OK' and 'Cancel' buttons.

- To remove a date, select the date and click the Remove button. In the Interaction Administrator message dialog box, click on Yes.

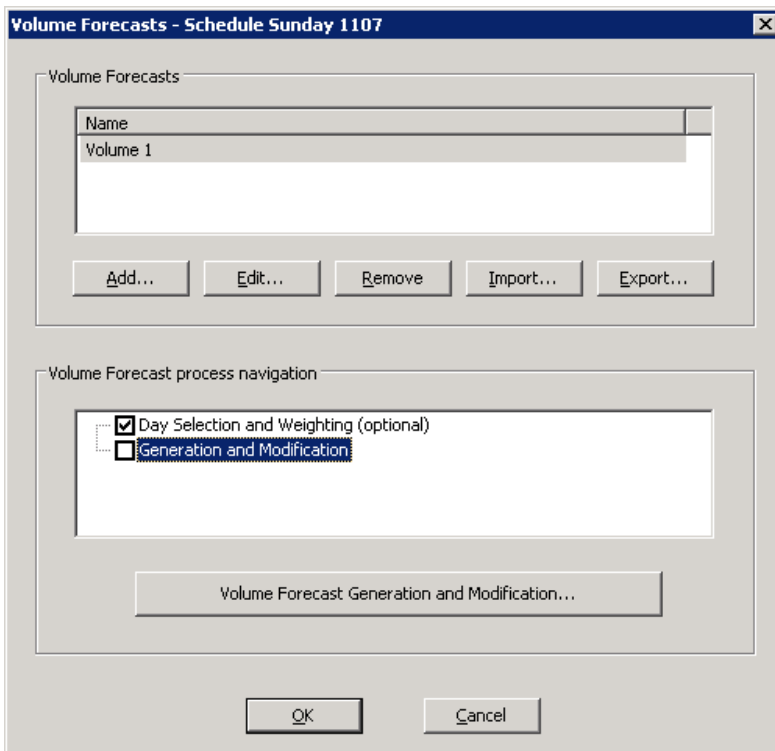
Note: For example, if Workforce is using the last six weeks of data by default, but this includes an errant day that they don't want to use, they can remove the day selection.



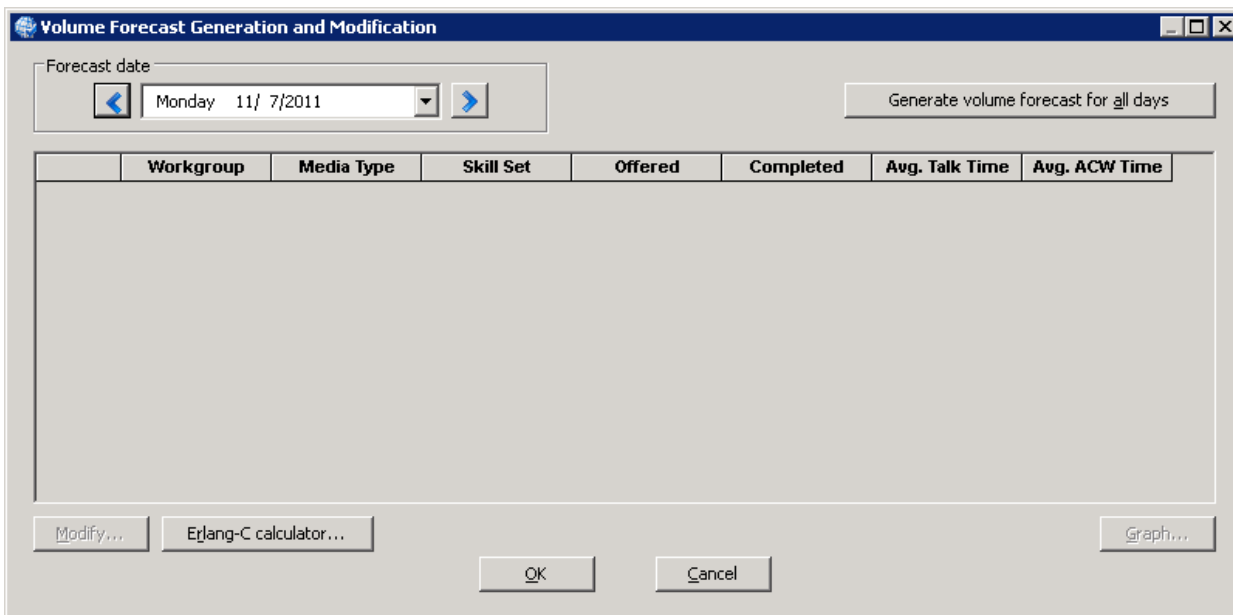
4. When Workforce have completed Day Selection and Weighting, in the Day Selection dialog box, select the checkbox next to Day Selection and Weighting and click OK.
5. Proceed to the next section, Volume forecast generation and modification.

- **Generate a volume forecast**

1. Do one of the following in the Volume Forecasts dialog box:
 - Double-click the Generation and Modification check box in the Volume Forecast process navigation list.
 - Select the Generation and Modification check box and click the Volume Forecast Generation and Modification... button.

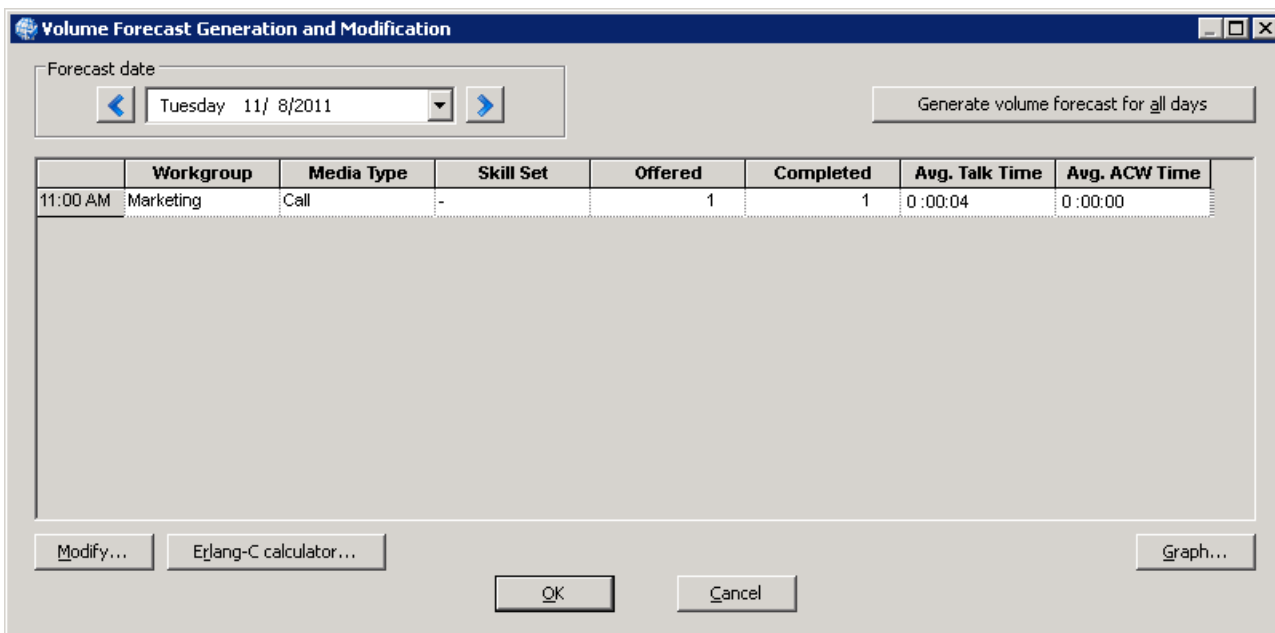


➤ Volume Forecast Generation and Modification dialog box



The dialog box is titled "Volume Forecast Generation and Modification". It features a "Forecast date" section with a date picker set to "Monday 11/ 7/2011" and a "Generate volume forecast for all days" button. Below this is a table with the following headers: "Workgroup", "Media Type", "Skill Set", "Offered", "Completed", "Avg. Talk Time", and "Avg. ACW Time". The table body is empty. At the bottom, there are buttons for "Modify...", "Erlang-C calculator...", "OK", "Cancel", and "Graph...".

2. If Workforce have not yet generated this volume forecast, the Volume Forecast Generation and Modification dialog box is blank (as shown above). Click the Generate volume forecast for all days button. Interaction Optimizer generates the volume forecast for all existing route groups (workgroup/skill/media type) by time slice.



The dialog box is titled "Volume Forecast Generation and Modification". It features a "Forecast date" section with a date picker set to "Tuesday 11/ 8/2011" and a "Generate volume forecast for all days" button. Below this is a table with the following headers: "Workgroup", "Media Type", "Skill Set", "Offered", "Completed", "Avg. Talk Time", and "Avg. ACW Time". The table body contains one row of data for "11:00 AM". At the bottom, there are buttons for "Modify...", "Erlang-C calculator...", "OK", "Cancel", and "Graph...".

	Workgroup	Media Type	Skill Set	Offered	Completed	Avg. Talk Time	Avg. ACW Time
11:00 AM	Marketing	Call	-	1	1	0:00:04	0:00:00

- Forecast date controls at the top of the screen determine which set of volume data is shown on the below list...

Column Name	Description
Time	This is the beginning of the interval in which the interactions occurred. The time of day appears as HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59.
Workgroup	The name of the workgroup to which the interactions were routed.
Media Type	This is the type of interaction: call, chat or email.
Skill Set	This is the skill set of the CSR(s) handling the interactions. It can be '*' to represent a summary row, '-' to represent no specific skill, or can be a ' ' separated list.
Offered	This is the number of interactions offered in the time interval.
Completed	This is the number of interactions completed by the CSRs in the time interval.
Avg. Talk Time	This is the average time in HH:MM:SS of each interaction in the time interval. It is calculated by total talk time/number of completed interactions, within the time increment.
Avg. ACW Time	This is the average after call work time in HH:MM:SS for each interaction in the time interval. It is calculated by total after call work time/number of interactions that had after call work time.

3. In the Volume Forecast Generation and Modification dialog box, select a Forecast date and a displayed value, then either type a new value or use the spinner control to set a new value.
 - Workforce can edit values in these columns:
 - Offered
 - Completed
 - Avg. Talk Time
 - Avg. ACW Time

Volume Forecast Generation and Modification

Forecast date: Sunday 10/15/2006

	Workgroup	Media Type	Skill Set	Offered
12:00 AM	Help Desk	Call	-	85
12:00 AM	Help Desk	Call	Danish	2
12:00 AM	Help Desk	Call	Dutch	3
12:00 AM	Help Desk	Call	English	2
12:00 AM	Help Desk	Call	French	3
12:00 AM	Help Desk	Call	German	5
12:00 AM	Help Desk	Call	Italian	1
12:00 AM	Help Desk	Call	Japanese	1
12:00 AM	Help Desk	Call	Korean	1

4. In the Volume Forecast Generation and Modification dialog box, select a Forecast date and click the Modify... button to change the data en masse. The Volume Forecast Data Modification dialog box appears.

Volume Forecast Data Modification

Modify	Workgroup	Media Type	Skill Set
☐	Marketing	Call	-

Select all

Interactions offered: %

Talk time: %

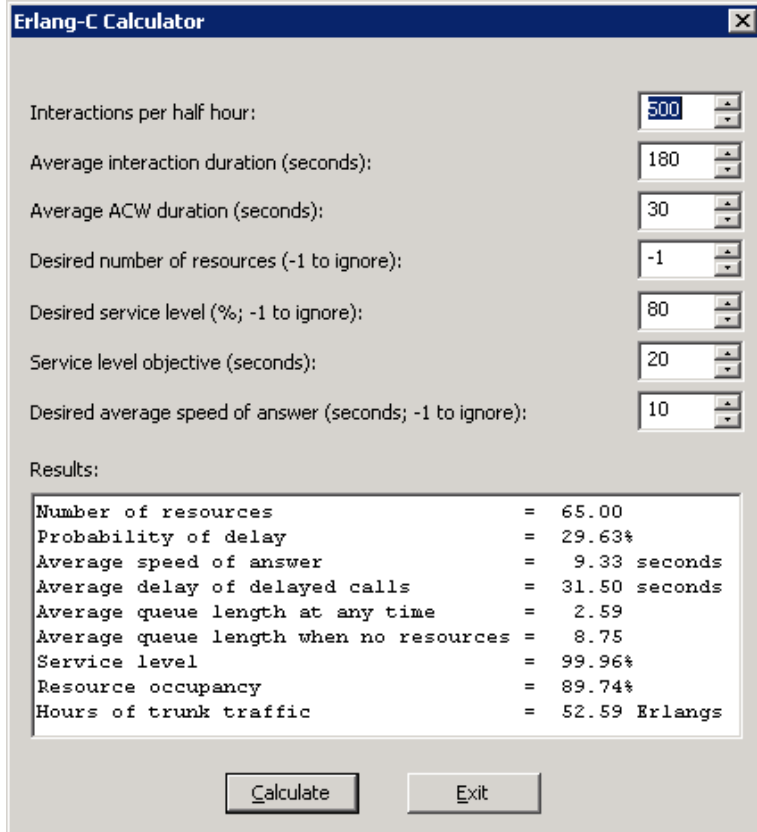
ACW time: %

OK Cancel

- Make changes to a range of data
 - Select the route groups by placing a checkmark in the Modify column.
 - Adjust the values for Interactions offered, Talk time, and/or ACW time by adjusting the slider controls or typing a new value in the appropriate % box. Then click Ok.

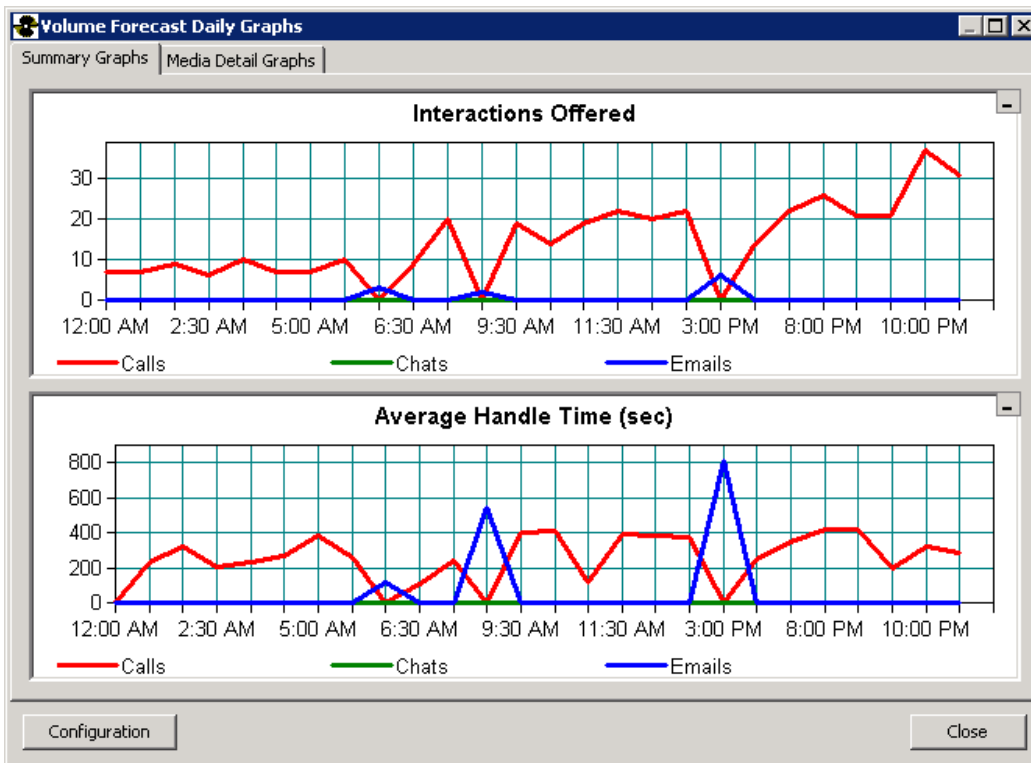
Warning: Adjusting this data by a given percentage removes the existing data. The only way to “undo” that increase is to click the Cancel button on the Volume Forecast Data Modification screen.

5. In the Volume Forecast Generation and Modification dialog box, click the Erlang-C calculator... button to display a simple Erlang-C calculator.

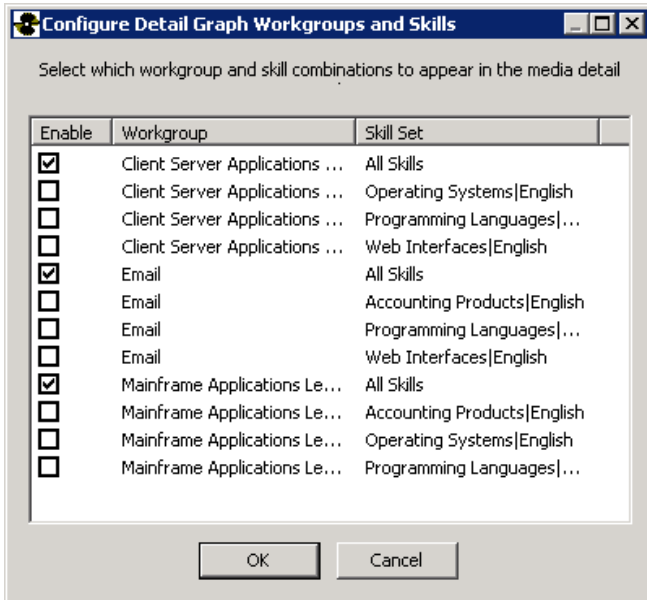


Results:	
Number of resources	= 65.00
Probability of delay	= 29.63%
Average speed of answer	= 9.33 seconds
Average delay of delayed calls	= 31.50 seconds
Average queue length at any time	= 2.59
Average queue length when no resources	= 8.75
Service level	= 99.96%
Resource occupancy	= 89.74%
Hours of trunk traffic	= 52.59 Erlangs

6. In the Volume Forecasts dialog box, do one of the following:
 - In the Volume Forecasts dialog box, click the Volume Forecast name to which to import data and click Import... to retrieve previously saved volume forecast data. In the Volume Forecast Import dialog box, click the ... (ellipsis) button. In the Open dialog box, select a file containing volume forecast data and click Open. In the Volume Forecast Import dialog box, click Replace Data to replace the existing headcount forecast data with the data in the import file or click Merge Data to merge the existing headcount forecast data with the data in the import file. Click OK.
7. In the Volume Forecast Generation and Modification dialog box, click the Graph... button, to display graphs based on the data in the grid. After Workforce completes their review of the graphs, click Close.
 - Summary Graphs. The Interactions Offered graph shows the time and number of interactions (calls, chats, and emails) that were offered. The Average Handle Time (sec) graph shows the time and handled time in average seconds of interactions (calls, chats, and emails) received.
 - Media Detail Graphs. These graphs show the calls, chats and emails offered by time based on skills. There is only one media type per graph.



8. In the Volume Forecast Daily Graphs dialog box, click the Configuration button to select route groups to include in the graphs. The Configure Detail Graph Workgroups and Skills dialog box appears. One selection row exists for each route group identified in the data. Select the Enable checkbox of the desired workgroup and skill set, and then click OK to view the changes in the graph.



9. When they finish generating the volume forecast, in the Volume Forecast Generation and Modification dialog box, click OK.
10. In the Volume Forecasts dialog box, select the checkbox next to Generation and Modification and click OK.
11. In the Scheduling Unit dialog box, select the checkbox next to 2. Volume Forecasting and click Apply.
12. Continue with Headcount Forecasting section.

Exported volume forecast data

This section details the format and content of data exported from the **Volume Forecast** dialog box. Data can be exported for use in an Excel spreadsheet.

```

volforecast.tsv - Notepad
File Edit Format View Help
# Format
# <time>T<duration>T<workgroup>T<media>T<skills>T<#offered>T<#completed>T<talktime>T<#ACW>T<ACWtime>
#
# where T is a tab,
# <time> is the time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59
# all numeric stats apply to interactions that take place from <time> up through the <duration>
# <duration> is the duration of this period, in seconds
# <workgroup> is the name of the ACD workgroup
# <media> is the media type. It must be one of 'Call', 'Chat', 'Email object'. Case is irrelevant
# <skills> is the skill set used. It can be either empty or '-' to represent no specific skill, or
# can be a '|' separated list.
# <#offered> is a count of the number of interactions offered to the particular
# <workgroup>/<media>/<skills> route group
# <#completed> is a count of the number of interactions completed by the agents in the
# <workgroup>/<media>/<skills> route group
# <talktime> is the time in seconds that the interactions took to process for the
# <workgroup>/<media>/<skills> route group
# <#ACW> is the count of after call work occurrences for interactions for the
# <workgroup>/<media>/<skills> route group
# <ACWtime> is the time in seconds that the total after call work occurrences took for the
# <workgroup>/<media>/<skills> route group
#
00:00 1800 Client Server Applications Level 1 1 HR Products 8 7 4092 6 1621
00:00 1800 Client Server Applications Level 1 1 Operating Systems 7 6 4281 5 2633
00:00 1800 Client Server Applications Level 1 1 Programming Languages 5 4 3462 4 1377
00:00 1800 Client Server Applications Level 1 1 Web Interfaces 6 5 5951 4 1232
00:00 1800 Client Server Applications Level 2 1 HR Products 9 8 5539 7 2832
00:00 1800 Client Server Applications Level 2 1 Operating Systems 8 7 5110 6 1561
00:00 1800 Client Server Applications Level 2 1 Programming Languages 8 7 5905 6 2240
00:00 1800 Client Server Applications Level 2 1 Spanish 7 6 4503 5 2462
00:00 1800 Mainframe Applications Level 1 1 Operating Systems 6 5 5585 4 2943
00:00 1800 Mainframe Applications Level 1 1 Programming Languages 7 6 3558 6 1691
00:00 1800 Mainframe Applications Level 1 1 Web Interfaces 7 6 4749 5 2590
00:00 1800 Mainframe Applications Level 2 1 Programming Languages 7 6 4700 5 2856
00:00 1800 Mainframe Applications Level 2 1 Web Interfaces 8 7 4566 6 1387
00:00 1800 Mainframe Applications Level 2 4 Web Interfaces 10 9 4291 8 2953
00:30 1800 Client Server Applications Level 1 1 Operating Systems 6 5 5290 4 1889
00:30 1800 Client Server Applications Level 1 1 Programming Languages 8 7 5478 6 2699
00:30 1800 Client Server Applications Level 1 1 Spanish 8 7 3697 6 2620
00:30 1800 Client Server Applications Level 1 1 Web Interfaces 6 5 5996 4 2875
00:30 1800 Client Server Applications Level 1 4 Operating Systems 10 9 5271 8 2630
00:30 1800 Client Server Applications Level 2 1 HR Products 7 6 4106 5 1702
00:30 1800 Client Server Applications Level 2 1 Programming Languages 8 7 3800 6 937
00:30 1800 Client Server Applications Level 2 1 Spanish 6 5 4141 4 1859
00:30 1800 Client Server Applications Level 2 1 Web Interfaces 6 5 3694 4 1224
00:30 1800 Client Server Applications Level 2 4 Programming Languages 8 7 3553 6 1453
00:30 1800 Client Server Applications Level 2 4 Spanish 7 6 4556 5 2195
00:30 1800 Mainframe Applications Level 1 1 HR Products 6 5 5565 4 2835
00:30 1800 Mainframe Applications Level 1 1 Programming Languages 9 8 4307 7 2231
00:30 1800 Mainframe Applications Level 1 1 Spanish 6 5 5415 4 1340

```

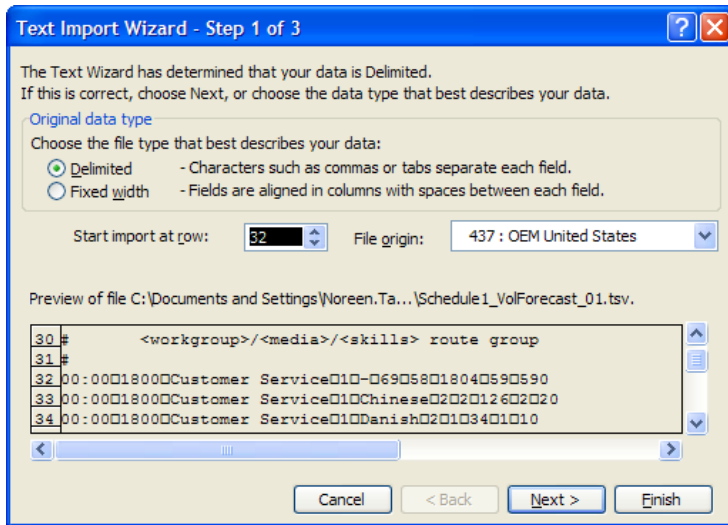
- The following is a description of the file format for Workforce reference.
 - Columns must go from left to right in the text file in the sequential order shown in the table.
 - The Column Name does not have to appear in the text file; just the data as described.
 - Each column is separated by one <TAB> (0x09) character.
 - Rows starting with a pound sign ("#") are ignored.

Column Name	Description
Time	This is the beginning of the interval in which the interactions occurred. The time of day appears as HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59.
Duration	The duration of this period, in seconds. This value is set in Interaction Administrator, Server Parameters container, QueuePeriodStatisticsInterval parameter. By default it is set for 1800 seconds (30 minutes).

	Do not change it in this file unless Workforce has changed this server parameter when they installed CIC, before they started collecting statistics.																
Workgroup	The media type. To enable combinations of the three available media types, each one has been assigned an integer which, when converted to base 2 (binary), indicates which media type(s) is (are) selected. The following list helps decode "media" column to the combinations of media each integer represents. <table> <tr> <th>Integer Value</th><th>Media Type(s)</th></tr> <tr> <td>1</td><td>Call</td></tr> <tr> <td>2</td><td>Chat</td></tr> <tr> <td>3</td><td>Call, Chat</td></tr> <tr> <td>4</td><td>Email</td></tr> <tr> <td>5</td><td>Call, Email</td></tr> <tr> <td>6</td><td>Chat, Email</td></tr> <tr> <td>7</td><td>Call, Chat, Email</td></tr> </table>	Integer Value	Media Type(s)	1	Call	2	Chat	3	Call, Chat	4	Email	5	Call, Email	6	Chat, Email	7	Call, Chat, Email
Integer Value	Media Type(s)																
1	Call																
2	Chat																
3	Call, Chat																
4	Email																
5	Call, Email																
6	Chat, Email																
7	Call, Chat, Email																
Skills	This is the skill set of the CSR(s) handling the interactions. It can be '*' to represent a summary row, '-' to represent no specific skill, or can be a ' ' separated list.																
#Offered	The number of interactions offered in the time interval.																
#Completed	The number of interactions completed by the CSRs in the time interval.																
Talktime	The time in seconds that all of the interactions in this time slice took to process.																
#ACW	The number of after call work occurrences for interactions.																
ACWTime	The time in seconds that all of the after call work occurrences took for this time slice.																

- **Import volume forecast data into Excel:**

1. Open the exported volume forecast data file in Microsoft Excel. The Text Import Wizard – Step 1 of 3 dialog box appears.



The Text Wizard has determined that your data is Delimited.
If this is correct, choose Next, or choose the data type that best describes your data.

Original data type
Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.
☐ Fixed width - Fields are aligned in columns with spaces between each field.

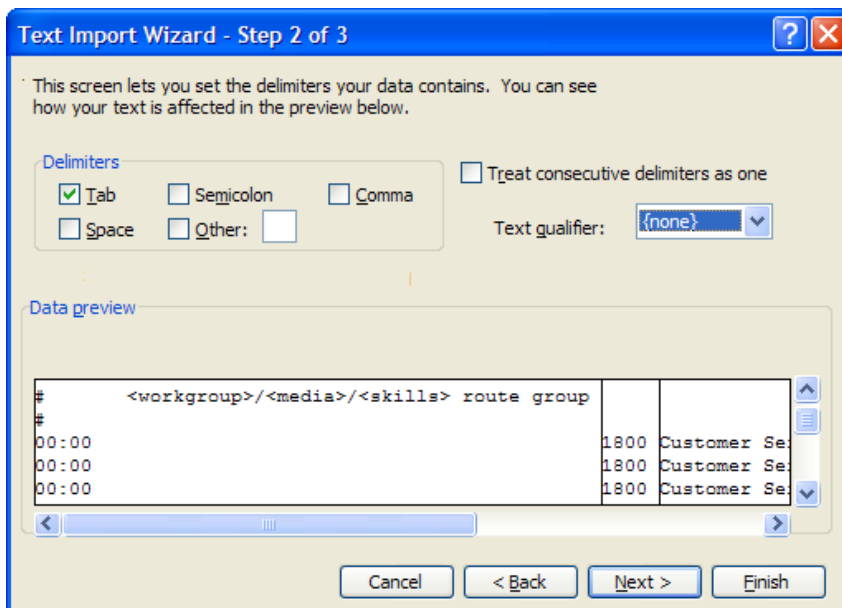
Start import at row: File origin:

Preview of file C:\Documents and Settings\Noreen.Ta... \Schedule1_VolForecast_01.tsv.

30	#	<workgroup>/<media>/<skills> route group
31	#	
32	00:00	1800 Customer Service 010-069058018040590590
33	00:00	1800 Customer Service 010Chinese0202012602020
34	00:00	1800 Customer Service 010Danish020103401010

Buttons: Cancel, < Back, Next >, Finish

2. Select Delimited as the file type.
3. Set Start import at row to 32. This is the first data row after the formatting comments automatically saved with the file.
4. Click Next >. The Text Import Wizard – Step 2 of 3 dialog box appears.



This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☒ Tab ☐ Semicolon ☐ Comma
☐ Space ☐ Other:

☐ Treat consecutive delimiters as one

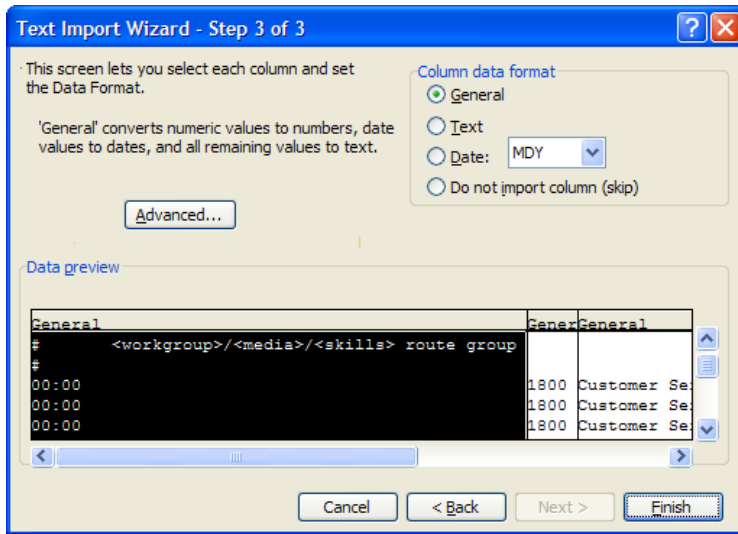
Text qualifier:

Data preview

#	<workgroup>/<media>/<skills> route group
#	
00:00	1800 Customer Se:
00:00	1800 Customer Se:
00:00	1800 Customer Se:

Buttons: Cancel, < Back, Next >, Finish

5. In the Text Import Wizard – Step 2 of 3 dialog box, select Tab in the Delimiters section. Set Text Qualifier to {none}.
6. Click Next >. The Text Import Wizard – Step 3 of 3 dialog box appears.



Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

[Advanced...](#)

Column data format

☒ General

☐ Text

☐ Date: MDY

☐ Do not import column (skip)

Data preview

General	General	General
#	<workgroup>/<media>/<skills> route group	
#		
00:00	1800	Customer Se
00:00	1800	Customer Se
00:00	1800	Customer Se

Cancel < Back Next > Finish

7. Workforce can specify the data type of each column according to the format, but Excel does a very good job of identifying the data type and configuring each cell accordingly.
8. Click Finish to import the data to a blank spreadsheet.

3.1.3.Headcount Forecasting

Headcount forecasting is the process by which the number of CSRs required to handle the forecasted interaction volume load is predicted. Other factors are used to adjust the forecast, such as service level, shrinkage factor, abandoned interactions, customer satisfaction, etc.

The headcount forecast can be generated using one of these methods:

- **Erlang-C method**

Erlang-C is considered the "standard" by which many contact centers operate. Developed by Danish mathematician A.K. Erlang in 1917 who studied delays in telephone traffic in central switching stations, it has become accepted by many industries as the first step in accurately predicting the number of servers required for many types of applications. A "server" used here means someone (or something) that serves a client which arrives at a random interval but whose probability of arrival during a given time slice is known. A "server" can be an CSR in a contact center, an automated or human tollbooth on a bridge, a teller or ATM at a neighborhood bank, etc. It returns the probability that a client will have to wait for a resource to be served.

Advantages of Erlang-C	Disadvantages of Erlang-C
Assumes random interaction arrival and that interactions queue if an CSR is not immediately available.	Assumes no abandoned interactions or busy signals.
Is accurate at good service levels, where abandoned interactions and busy signals are minimal.	Assumes "steady state" arrival, or that traffic does not increase or decrease beyond random fluctuation within the time period.
Is easy and quick to use and available in software form from a wide variety of sources.	Assumes Workforce have a fixed number of staff handling interactions throughout the time period.
Is the basis for staffing calculations in almost all workforce management software programs.	Assumes that all CSRs within a group can handle the interactions presented to the group. (Overlapping CSR groups and skill-based routing not taken into account.)

- **ACD simulation**

Computer simulations have been used widely in business and economic analysis to help predict demand using the power of a computer's random number generation and logic to run hundreds or thousands of virtual events. Also referred to as a "Monte Carlo simulation," a computer could be used to forecast revenue by simulating consumer purchase patterns based on a known purchase distribution, or to place "interactions" and have virtual CSRs service those interactions based on randomly assigned interaction attributes, such as arrival time and duration, and a given service level.

Interaction Optimizer takes the volume of interactions forecasted, generates a workgroup, skill and media type for each interaction then randomizes arrival time and AHT. It then feeds each interaction into a simulated ACD according to the generated arrival time. Virtual CSRs are assigned to take the interactions and are tagged as "busy" until the randomly generated AHT has expired. Virtual CSRs are added to take the virtual interactions to meet the configured service level. The number of virtual CSRs required becomes the headcount forecast which is then used to generate the schedule.

- **Import**

- **Calculating shrinkage (Rostered staff factor)**

The concept of shrinkage is that even though CSRs are scheduled to be taking interactions for a given shift, some will not be taking interactions. This factor must be calculated to enable adequate staffing. Shrinkage could be due to many things:

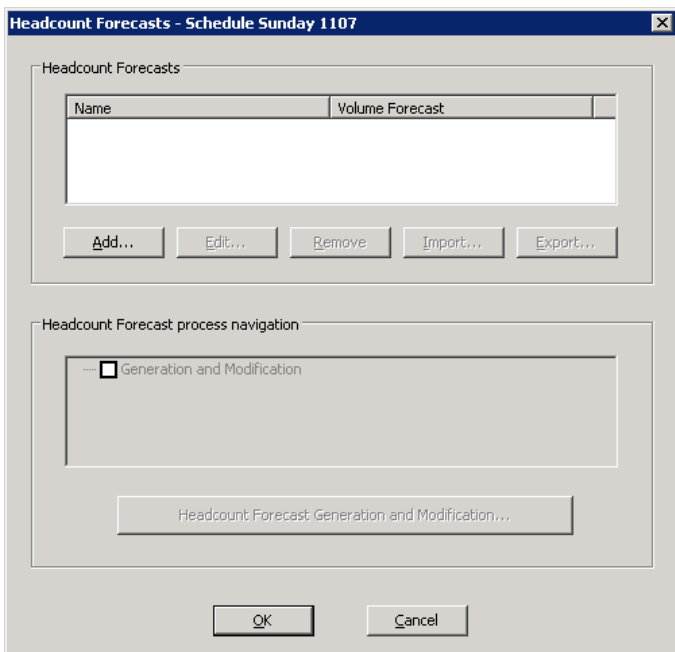
- Breaks
- Meals
- Unscheduled absences*
- Vacations
- Training
- Coaching
- Holidays
- Non-Adherence*
- Meetings

- **One possible way to calculate shrinkage:**

1. Identify base staff required per time slice by media type.
2. Identify the activities that keep CSRs away from responding to contacts.
3. Add base staff to the number of CSRs who are not answering phones in a given time slice.
4. Divide the total number of CSRs required by the base. This is their shrinkage factor for the given time slice. It may be necessary to average these to enter a shrinkage factor for a given scheduling unit.

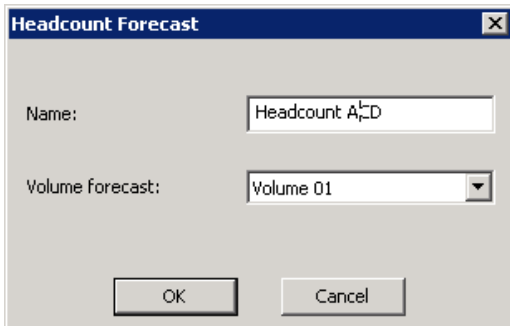
- **Select a forecast headcount method**

1. Once Workforce has completed reviewing and possibly adjusting data on the Volume Forecast screens, do one of the following in the Scheduling Unit dialog box:
 - Double click the 3. Headcount Forecasting check box in the Forecast and Schedule process navigation section.
 - Select the 3. Headcount Forecasting check box and click the Headcount Forecasting... button.



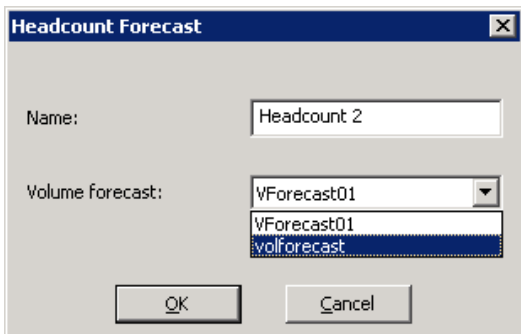
2. In the Headcount Forecasts section, do one of the following:

- To create a new headcount forecast, click Add.... In the Name box, type a name for the new headcount forecast. From the Volume forecast dropdown list, select an existing volume forecast and click OK.



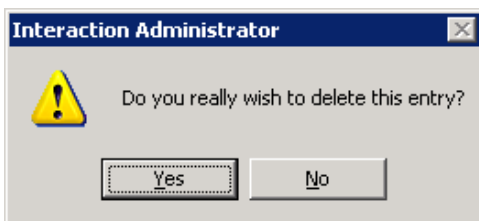
The dialog box titled "Headcount Forecast" has a close button (X) in the top right corner. It contains two input fields: "Name:" with the text "Headcount A-D" and "Volume forecast:" with a dropdown menu showing "Volume 01". At the bottom are "OK" and "Cancel" buttons.

- To change the name of an existing headcount forecast or to associate it with a different volume forecast, select a headcount forecast name and click Edit.... Type a new name in the Name box and/or select a different volume forecast from the Volume forecast dropdown list and click OK.



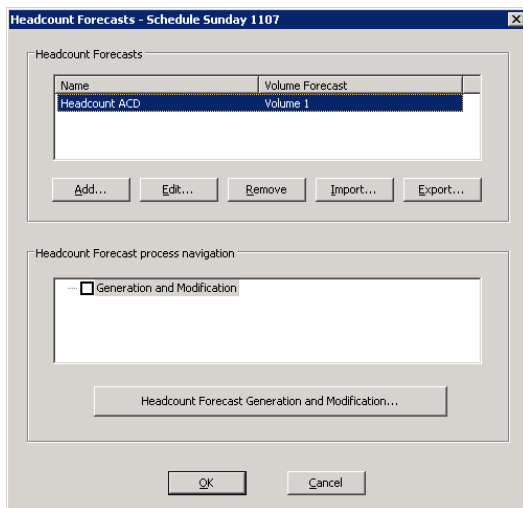
The dialog box titled "Headcount Forecast" has a close button (X) in the top right corner. It contains two input fields: "Name:" with the text "Headcount 2" and "Volume forecast:" with a dropdown menu showing "VForecast01". Below the dropdown menu, the text "VForecast01" and "volforecast" are visible, suggesting a list of options. At the bottom are "OK" and "Cancel" buttons.

- To delete an existing headcount forecast, select a headcount forecast name and click Remove. In the Interaction Administrator message dialog box, click on Yes.

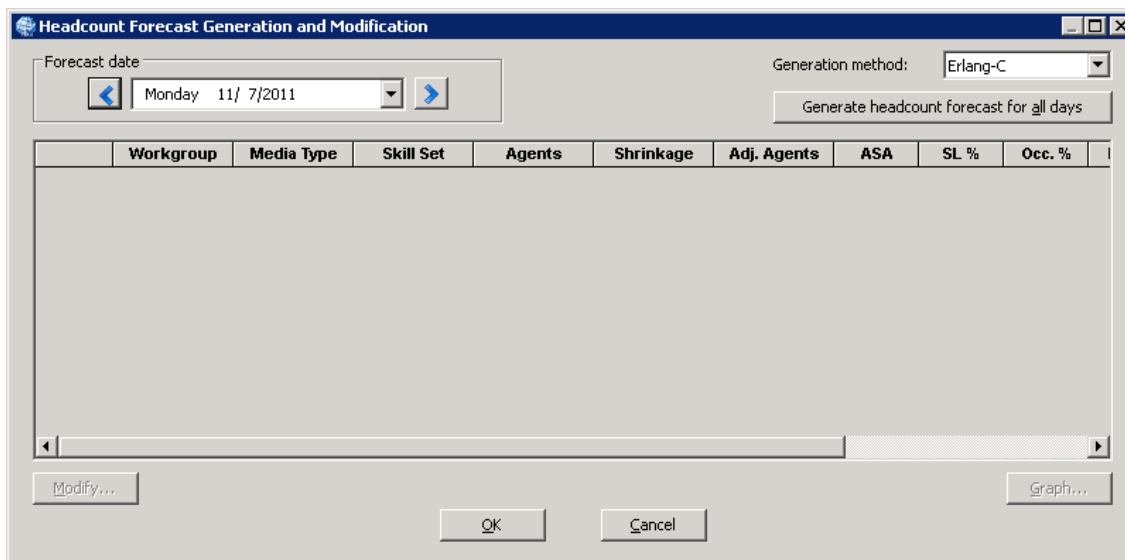


The dialog box titled "Interaction Administrator" has a close button (X) in the top right corner. It features a yellow warning triangle icon and the text "Do you really wish to delete this entry?". At the bottom are "Yes" and "No" buttons.

3. From the Headcount Forecasts list, select a headcount forecast and do one of the following:



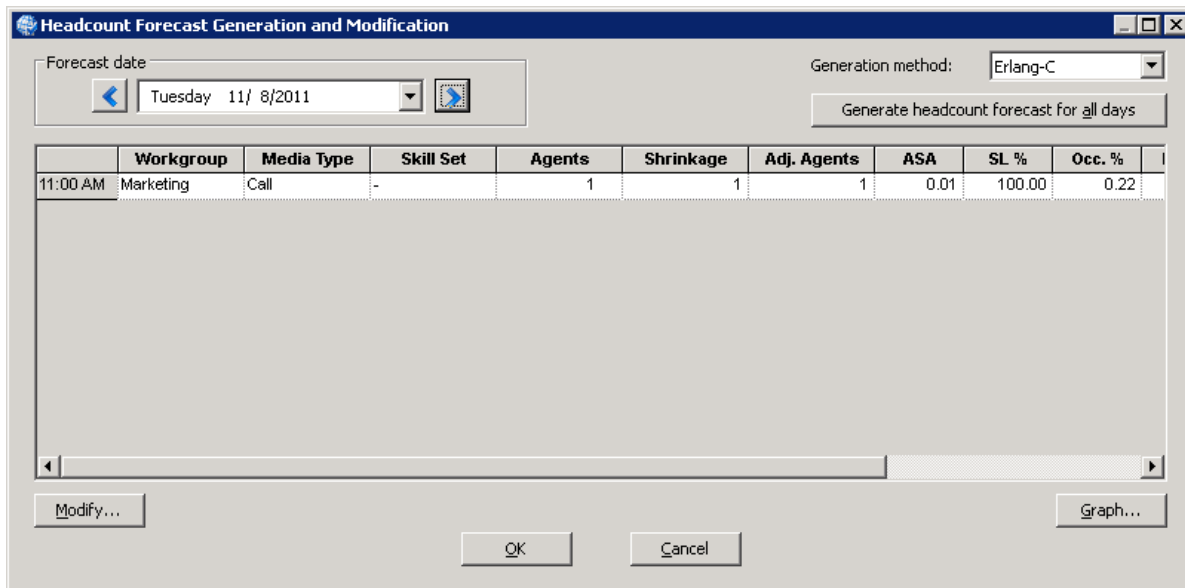
- Double click the Generation and Modification check box in the Headcount Forecast Process Navigation section.
- Click the Headcount Forecast Generation and Modification... button.



4. From the Generation method dropdown list, select a forecasting method and click on the Generate headcount forecast for all day button.

- **Generate headcount forecast using Erlang-C**

1. In the Headcount Forecast Generation and Modification dialog, click the arrow at the end of the Generation method drop-down list and select Erlang-C. Then click the Generate headcount forecast for all days button. The Erlang-C headcount forecast appears in the Headcount Forecast Generation and Modification dialog box.



The dialog box titled "Headcount Forecast Generation and Modification" contains the following elements:

- Forecast date:** A date picker showing "Tuesday 11/ 8/2011" with navigation arrows.
- Generation method:** A dropdown menu set to "Erlang-C".
- Action button:** "Generate headcount forecast for all days".
- Table:** A table with columns: Workgroup, Media Type, Skill Set, Agents, Shrinkage, Adj. Agents, ASA, SL %, Occ. %, and a final unlabeled column. The first row shows data for "Marketing" and "Call" media type.
- Buttons:** "Modify...", "OK", "Cancel", and "Graph..." at the bottom.

	Workgroup	Media Type	Skill Set	Agents	Shrinkage	Adj. Agents	ASA	SL %	Occ. %	
11:00 AM	Marketing	Call	-	1	1	1	0.01	100.00	0.22	

➤ Erlang-C Columns

Column Name	Description
Time	The time the interaction started.
Workgroup	The ACD workgroup portion of the route group identification.
Media Type	The type of interaction: call, chat, or email.
Skill Set	The skill set(s) of the CSR(s) who handled the interactions.
CSRs	The number of CSRs, represented by an integer, required to handle the interactions in this route group.
Shrinkage	The calculation to factor in unscheduled events during a shift, such as a long break or longer than expected lunches. It is also called non-excused shrinkage. See Calculating shrinkage.
Adj. CSRs	The number of CSRs multiplied by the shrinkage factor. This number may not be an integer, therefore it can be thought of as FTEs (full-time equivalents) rather than whole CSRs.
ASA	The average speed of answer in seconds.
SL%	The Service Level percentage. It is based on the number of interactions responded to within the time specified. This percentage would be achieved if the number of CSRs indicated in the row were taking interactions.
Occ.%	The Occupancy percentage. It is the amount of time a CSR would spend handling interactions during the given time slice as a percentage of their total time available to take interactions.
p(0)%	The probability of a delay greater than 0 seconds, meaning the probability of not getting an immediate answer.
Delay	The average delay of all delayed calls. It is based on only those calls that are actually delayed.
Queue1	The average number of interactions in queue at any given time, including times when there are not interactions in queue.
Queue2	The average number of interactions in queue when all CSRs are busy, and there are interactions in queue.

2. To adjust the number of CSRs and Shrinkage factor en masse, in the Headcount Forecast Generation and Modification dialog box, click the Modify button or click Cancel on the Headcount Forecast Data Modification dialog box. The Headcount Forecast Data Modification dialog box appears.

The screenshot shows the 'Headcount Forecast Data Modification' dialog box. It features a table with four columns: 'Modify', 'Workgroup', 'Media Type', and 'Skill Set'. The table contains seven rows of data. The first row is selected, and the 'Modify' checkbox is checked. Below the table is a 'Select all' button. At the bottom, there are two sliders: 'Agents' and 'Shrinkage', each with a corresponding percentage input box. The 'Agents' box contains '10' and the 'Shrinkage' box contains '0'. At the very bottom are 'OK' and 'Cancel' buttons.

Modify	Workgroup	Media Type	Skill Set
☒	Client Server Application	Call	Operating Systems Engli
☐	Client Server Application	Call	Programming Languages
☐	Client Server Application	Call	Web Interfaces English
☒	Email	Email	Accounting Products Eng
☐	Email	Email	Programming Languages
☐	Email	Email	Web Interfaces English
☐	Mainframe Applications	Call	Accounting Products Eng

Select all

Agents: %

Shrinkage: %

OK Cancel

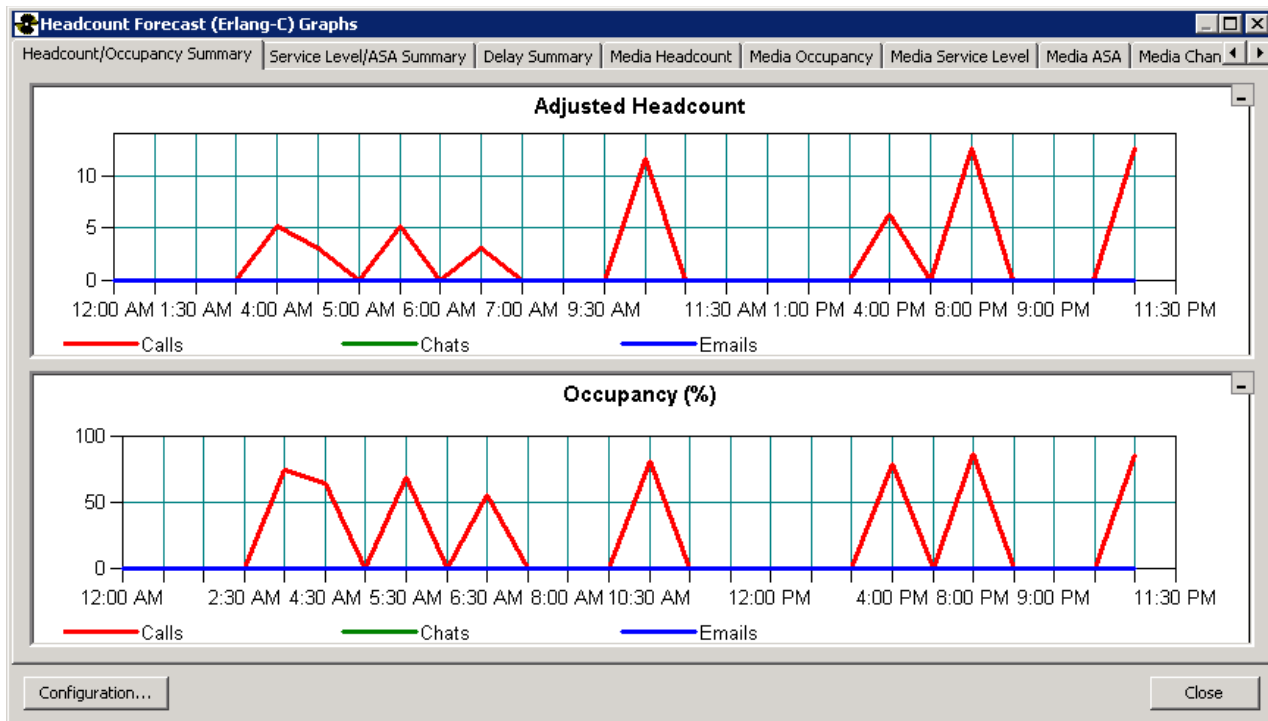
3. Select the route group(s) and adjust the number of CSRs required and the shrinkage factor by moving the CSRs or Shrinkage slider controls or typing a value in the % boxes.

Warning: Adjusting this data by a given percentage removes the existing data. Meaning, the only way to "undo" that increase is to click Cancel and then click the Modify... button again on the Headcount Forecast Data Modification dialog box.

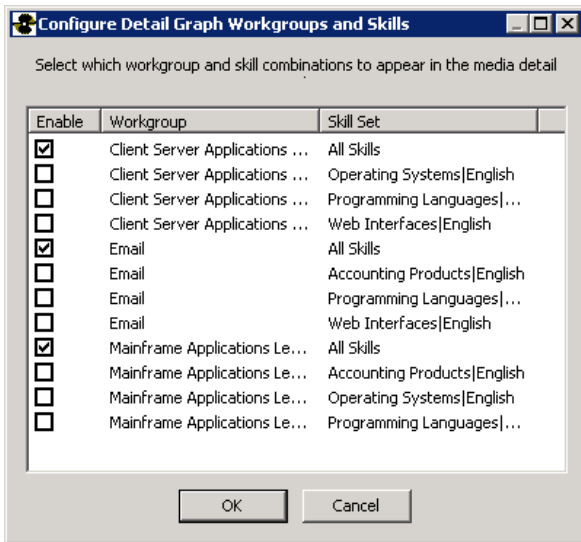
4. In the Headcount Forecasts dialog box, click the Export... button to save headcount forecast data. In the Save As dialog box, in the File name box, type a name for the data file. The file extension is ".tsv" by default.
5. In the Headcount Forecast Generation and Modification dialog box, click the Graph... button, to display graphs based on the data in the grid. After Workforce completes their review of the graphs, click Close.
 - Available Graphs:

Graphs	Descriptions
Headcount/Occupancy Summary	These graphs display Adjusted Headcount and Occupancy % with all media types (calls, chats, and emails) for all route groups combined.
Service Level/ASA Summary	These graphs display Service Level and Average Speed of Answer with all media types (calls, chats, and emails) for all route groups combined.
Delay Summary	These graphs display Chance of Delay % and Average Delay of Delayed Interactions with all media types (calls, chats, and emails) for all route groups combined.

Media Headcount	These graphs display Adjusted Headcount for individual Call, Chat and Email media types by route group.
Media Occupancy	These graphs display the Occupancy % for individual Call, Chat and Email media types by route group.
Media Service Level	These graphs display the Service Level % for individual Call, Chat and Email media types by route group.
Media ASA	These graphs display the Average Speed of Answer for individual Call, Chat and Email media types by route group.
Media Chance of Delay	[this is the "P(0)" column]. These graphs display the Chance of Delay % for individual Call, Chat and Email media types by route group.
Media Average Delay	These graphs display the Average Delayed of Delayed for individual Call, Chat and Email media types by route group.



6. In the Headcount Forecast (Erlang-C) Graphs dialog box, click the Configuration... button to change the workgroup(s) and skill set(s) displayed on these graphs. Click OK to display the changes to the graphs.



7. When Workforce finishes generating the headcount forecast, in the Headcount Forecast Generation and Modification dialog box, click OK.
8. In the Headcount Forecasts dialog box, click OK.
9. In the Scheduling Unit dialog box, select the checkbox next to 3. Headcount Forecasting and click Apply.
10. Continue with the Generate a New Schedule section.

- **Generate headcount forecast using ACD simulation**

This method uses a simulated ACD to route the interactions, as predicted by the volume forecast, by route group by time slice, to simulated CSRs organized into staffing groups. The interaction arrival time is randomized within each time slice, as is the interaction duration and wrap-up time. During multiple simulation runs the CSRs are assigned, by staffing group, to meet the desired service level and/or average speed of answer specified. One can expect a more optimal headcount requirement with more cross trained CSRs (e.g. ability to take interaction of multiple media types for multiple workgroups and skill sets) as opposed to the case of CSRs being very specifically configured (e.g. limited workgroup membership, limited media type utilization, and/or limited skills set). A headcount is predicted for each time slice and the process is repeated throughout the entire schedule.

1. In the Headcount Forecast Generation and Modification dialog box, click the arrow at the end of the Generation Method drop-down list, select ACD simulation, and click the Generate headcount forecast for all days button.
 - ACD Simulation Parameters dialog box.

Workgroup	Media Type	Skill Set	Percent
Client Server Application	Call Chat Email	English Marketing Produc	7
Client Server Application	Call Chat Email	English Marketing Produc	2
Client Server Application	Call Chat Email	English Marketing Produc	7
Client Server Application	Call Chat Email		2
Client Server Application	Call Chat Email	English Marketing Produc	5
Client Server Application	Call Chat Email	English Programming Lan	7
Client Server Application	Call Chat Email	English Marketing Produc	7

Percent(s) total: 102

Run with edits Run with defaults

2. Do one of the following:
 - Adjust the staffing percentages by editing the values in the Percent column then click Run with edits.
 - Accept the default (pre-rounding) staffing percentages in the Percent column and then click Run with defaults. The ACD Simulation dialog box will appear after Workforce clicks OK.



3. After the ACD Simulation completes, the forecast appears in the Headcount Forecast Generation and Modification dialog box.

Headcount Forecast Generation and Modification

Forecast date: Tuesday 11/7/2006

Generation method: ACD simulation

Generate headcount forecast for all days...

	Workgroup(s)	Media Type(s)	Skill Set	Agents	Shrinkage	Adj. Agents
12:00 AM	Client Server Applications Le	Call Chat Email	English Marketing Products O	1	1.05	1.05
1:00 AM	Client Server Applications Le	Call Chat Email	English Marketing Products O	3	1.05	3.15
1:00 AM	Client Server Applications Le	Call Chat Email	English Programming Langua	0	1.05	0
1:30 AM	Client Server Applications Le	Call Chat Email	English Marketing Products O	5	1.05	5.25
1:30 AM	Client Server Applications Le	Call Chat Email	English Programming Langua	0	1.05	0
2:30 AM	Client Server Applications Le	Call Chat Email	English Marketing Products O	5	1.05	5.25

	Workgroup	ASA	SL %	Occ. %	P(0) %	Delay	Queue1	Queue2
12:00 AM	Client Server Ap	0.00	100.00	9.76	0.00	0.00	0.00	0.00
12:00 AM	Client Server Ap	0.00	0.00	9.76	0.00	0.00	0.00	0.00
12:00 AM	Email	0.00	0.00	9.76	0.00	0.00	0.00	0.00
1:00 AM	Client Server Ap	14.37	85.42	59.37	10.87	132.20	0.02	1.00
1:00 AM	Client Server Ap	0.00	0.00	59.37	0.00	0.00	0.00	0.00
1:00 AM	Email	0.00	0.00	59.37	0.00	0.00	0.00	0.00

Buttons: Modify..., Import..., Export..., Graph..., OK, Cancel

- There are two distinct items in this dialog:
 - The top grid is organized by staffing group, by time slice and gives a predicted number of CSRs, adjusted for unplanned shrinkage, for each row.
 - The bottom grid displays the results of the simulation's expected performance parameters by workgroup by time slice (note that the media type and skill(s) are not listed in this item).

Summary of the Staffing Group columns (top grid)

Column Name	Description
Workgroup(s)	This is the ACD workgroup(s) portion of the Staffing Group identification.
Media Type	This is the type of interaction the CSR could handle. The type may be call, chat or email. This information is not based on historical ACD data. This is also the Media Type portion of the Staffing Group identification.
Skill Set	The skill set(s) of the CSR(s) in the staffing group. There may not be an associated skill set '-', or there may be a single skill set, or multiple skill sets separated by ' ' (pipe).
CSRs	The number of CSRs, represented by an integer, required to handle the interactions in the Staffing Group.
Shrinkage	The calculation to factor in unscheduled events during a shift, such as a long break or longer than expected lunch. It is also called the Non-excused shrinkage factor.

Adj. CSRs	The number of CSRs multiplied by the Shrinkage factor. This number may not be an integer and thus can be thought of as FTEs (full-time equivalents) rather than whole CSRs.
-----------	---

Summary of the Group columns (bottom grid)	
Column Name	Description
Workgroup(s)	The ACD workgroup portion of the route group.
ASA	The average speed of answer in seconds.
SL%	The Service Level percentage. It is based on the number of interactions responded to within the time specified. This percentage would be achieved if the number of CSRs indicated in the row were taking interactions.
Occ. %	The Occupancy percentage. It is the amount of time an CSR would spend handling interactions during the given time slice as a percentage of their total time available to take interactions.
P(0)%	The probability of a delay greater than 0 seconds, meaning the probability of not getting an immediate answer.
Delay	The average delay of all delayed calls. It is based on only those calls that are actually delayed.
Queue1	The average number of interactions in queue at any time, including times when there are no interactions in queue.
Queue2	The average number of interactions in queue when all CSRs are busy, and there are interactions in queue.

- To adjust the number of CSRs and Shrinkage factor en masse, in the Headcount Forecast Generation and Modification dialog box, click the Modify... button on the Headcount Forecast Data Modification screen. Headcount Forecast Data Modification dialog box will appear.

The screenshot shows the 'Headcount Forecast Data Modification' dialog box. It contains a table with columns: Modify, Workgroup, Media Type, and Skill Set. The table lists several entries with checkboxes in the 'Modify' column. Below the table is a 'Select all' button. At the bottom, there are two sliders: 'Agents' and 'Shrinkage', each with a corresponding input box showing values 10 and 0 respectively, followed by a '%' sign. 'OK' and 'Cancel' buttons are at the bottom.

Modify	Workgroup	Media Type	Skill Set
☒	Client Server Application	Call	Operating Systems Engli
☐	Client Server Application	Call	Programming Languages
☐	Client Server Application	Call	Web Interfaces English
☒	Email	Email	Accounting Products Eng
☐	Email	Email	Programming Languages
☐	Email	Email	Web Interfaces English
☐	Mainframe Applications L	Call	Accounting Products Eng

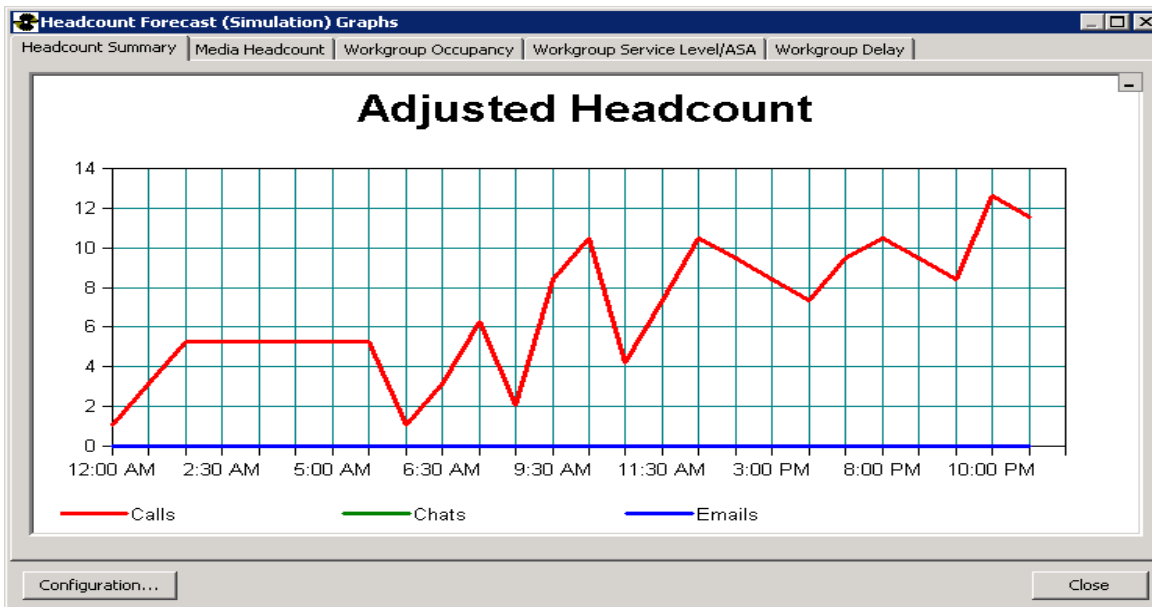
Agents: 10 %

Shrinkage: 0 %

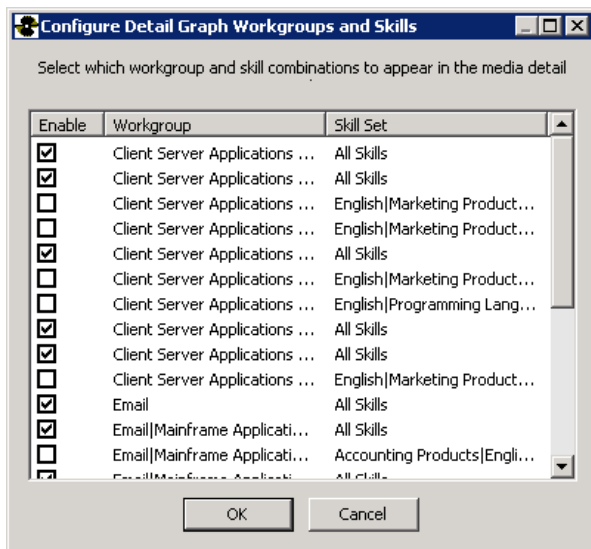
- Select the staffing group(s) and adjust the number of CSRs required and the shrinkage factor by moving the CSRs or Shrinkage slider controls or typing a value in the % boxes.

Warning: Adjusting this data by a given percentage removes the existing data. Meaning, the only way to “undo” that increase is to click Cancel and then click the Modify... button again and reduce the given data by a corresponding percentage on the Headcount Forecast Data Modification screen.

6. In the Headcount Forecasts dialog box, click the Export... button to save headcount forecast data. In the Save As dialog box, in the File name box, type a name for the data file. The file extension is ".tsv" by default.
7. In the Headcount Forecast Generation and Modification dialog box, click the Graph... button, to display graphs based on the data in the grid. After Workforce complete their review of the graphs, click Close.
 - Available Graphs:
 - Headcount Summary. This graph displays the Adjusted Headcount for all media types (Calls, Chats, and Emails) for all route groups combined.
 - Media Headcount. These graphs display the Adjusted Headcount for Call, Chat and Email by staffing group.
 - Workgroup Occupancy. This graph displays Workgroup Occupancy by staffing group.
 - Workgroup Service Level/ASA. These graphs display Workgroup Service Level % and Workgroup Average Speed of Answer by staffing group.
 - Workgroup Delay. These graphs display Workgroup Chance of Delay % and Workgroup Average Delay of Delayed Interactions by staffing group.



8. In the Headcount Forecast (Simulations) Graphs dialog box, click the Configuration button to change the workgroup(s) and skill set(s) displayed on these graphs. Click OK to display the changes to the graphs.

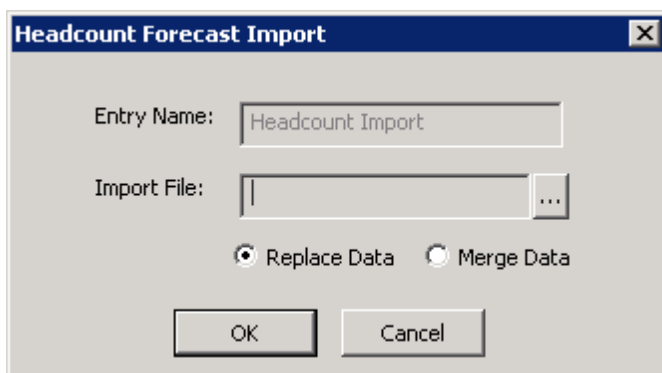


9. When Workforce finish generating the headcount forecast, in the Headcount Forecast Generation and Modification dialog box, click OK.
10. In the Headcount Forecasts dialog box, click OK.
11. In the Scheduling Unit dialog box, select the checkbox next to 3. Headcount Forecasting and click Apply.
12. Continue with the Generate a New Schedule section.

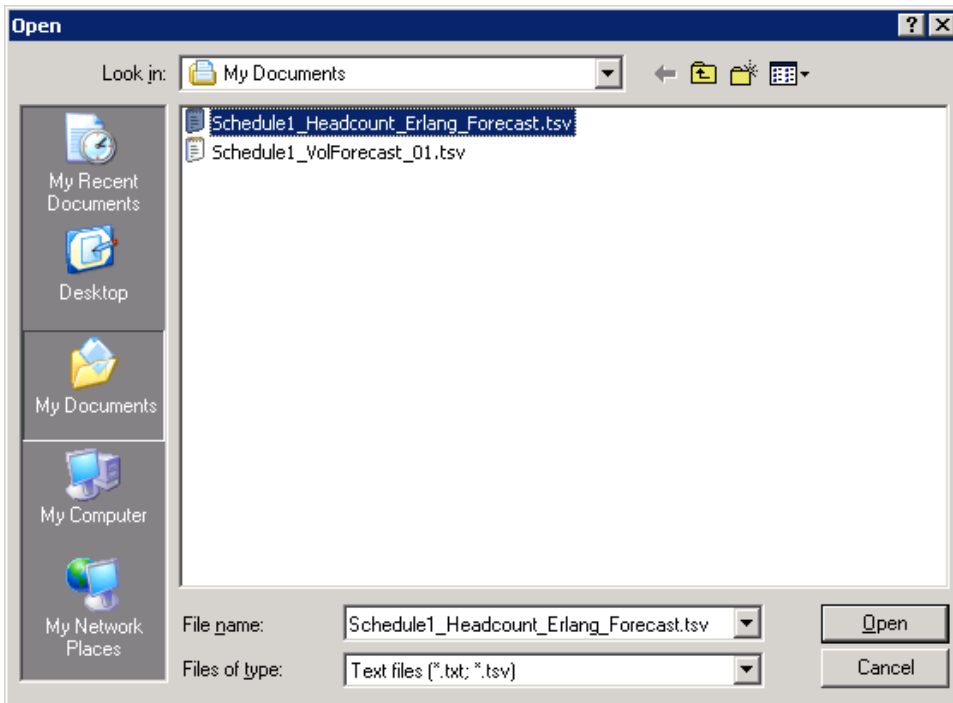
- **Generate headcount forecast using data import**

Workforce can use a previously saved headcount forecast to generate a schedule by importing headcount forecast data.

1. In the Headcount Forecasts dialog box, click the name in the Headcount Forecasts section to which to import data and click Import. The Headcount Forecast Import dialog box appears.



2. Click the ... (ellipsis) button. The Open dialog box appears.

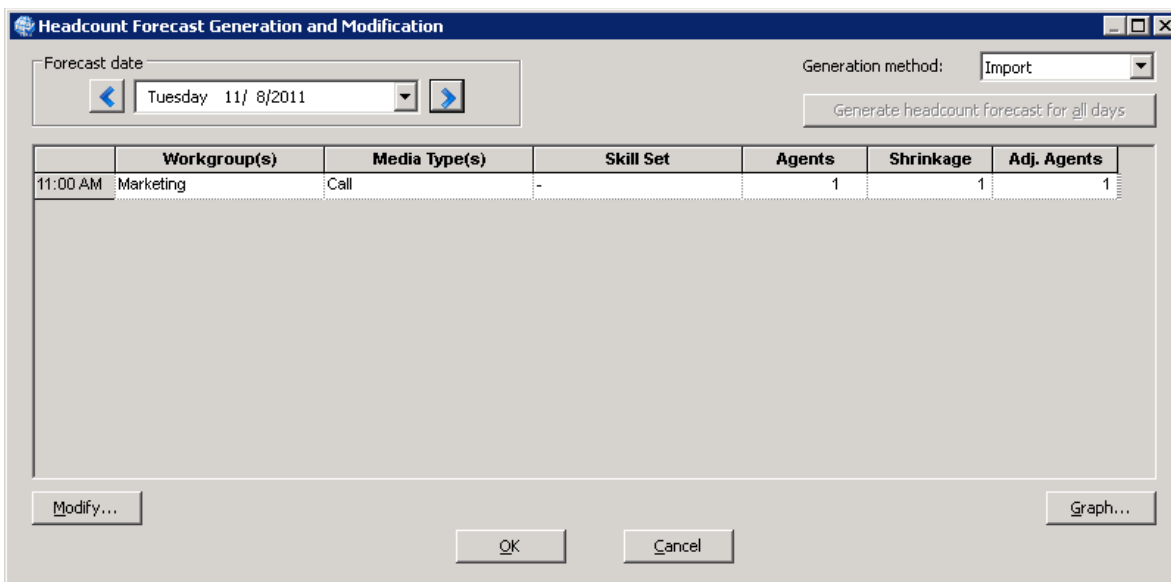


Select the appropriate headcount forecast data file and click Open.

3. Do one of the following:

- Click Replace Data to replace the existing headcount forecast data with the data in the import file.
- Click Merge Data to merge the existing headcount forecast data with the data in the import file.

4. Click OK. The imported data appears in the Headcount Forecast Generation and Modification dialog box.



- Exported headcount forecast data

This section details the formats used to save exported headcount forecast data. Workforce can use this saved headcount forecast data when generating a new schedule. They can also import this data to an Excel spreadsheet.

- Erlang-C headcount forecast data

If Workforce exports Erlang-C Headcount Forecast data, the data is saved in the following format. This is a screen of exported data (the columns do not look lined up since there is exactly one tab delimiting the columns). This data file can be imported into Excel with the Text Import Wizard.

```

headcount.tsv - Notepad
File Edit Format View Help
# Format for Erlang-C generated headcount forecast statistics
# All statistics are given by route group, and each line begins with the letter R
#
# R <time>T<duration>T<workgroup>T<media>T<skills>T<#resources>T<shrinkage>T<ASA>T<occ>T<P(0)>T<DlyDly>T<AvgQLen1>T<AvgQLen2>
#
# where T is a tab,
# <time> is the time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59
# NOTE: Times are all specified in the time zone local to the user running
#       Interaction Administrator. The time is converted from Universal Coordinated Time (UTC)
#       on export, and converted back to UTC on import.
# all numeric stats apply to interactions that take place from <time> up through the <duration>
# <duration> is the duration of this period, in seconds
# <workgroup> is the name of the ACD workgroup
# <media> is the media type. It must be an integer between 1 and 7. The number represents a
# bitwise-OR'd value of the following media types:
# Call - 1
# Chat - 2
# Email - 4
# <skills> is the skill set used. It can be either empty or '-' to represent no specific skill, or
# can be a '|' separated list.
# <#resources> is the number of agents required for the
# <workgroup>/<media>/<skills> route group
# <shrinkage> is a number used to adjust the number of resources
# required for the <workgroup>/<media>/<skills> route group
# The number of resources is multiplied by the shrinkage factor
# to determine the actual number of resources required.
# <ASA> is the average speed of answer (in seconds) for the
# <workgroup>/<media>/<skills> route group
# <SL> is the desired service level (0 - 1, inclusive) for the
# <workgroup>/<media>/<skills> route group
# <occ> is the agent occupancy (0 - 1, inclusive) for the
# <workgroup>/<media>/<skills> route group
# <P(0)> is the probability of a delay (> 0 seconds) for an interaction to
# be answered (0 - 1, inclusive) for the
# <workgroup>/<media>/<skills> route group
# <DlyDly> is the average delay (in seconds) of delayed interactions for the
# <workgroup>/<media>/<skills> route group
# <Q1> is the average number of interactions in the queue
# for all time, even when the queue is empty for the
# <workgroup>/<media>/<skills> route group
# <Q2> is the average number of interactions in the queue
# when all agents are busy and interactions are queued up
# for the <workgroup>/<media>/<skills> route group
#
R 00:00 1800 Client Server Applications Level 1 1 HR Products 5 1.050000 333.412981 0.858
R 00:00 1800 Client Server Applications Level 1 1 Operating Systems 6 1.050000 549.401651
R 00:00 1800 Client Server Applications Level 1 1 Programming Languages 5 1.050000 246.043972
R 00:00 1800 Client Server Applications Level 1 1 Web Interfaces 7 1.050000 240.792965 0.956
R 00:00 1800 Client Server Applications Level 2 1 HR Products 7 1.050000 324.956337 0.901
R 00:00 1800 Client Server Applications Level 2 1 Operating Systems 6 1.050000 242.501614
R 00:00 1800 Client Server Applications Level 2 1 Programming Languages 7 1.050000 327.105466

```

- To import Erlang-C Headcount Forecast data into Excel:

1. Open the exported Erlang-C Headcount Forecast data in Microsoft Excel.
2. In the Text Import Wizard – Step 1 of 3 dialog box, select Delimited as the file type.
3. Set Start import at row to 46. This is the first data row after the formatting comments automatically saved with the file.
4. Click Next >.
5. In the Text Import Wizard – Step 2 of 3 dialog box, select Tab in the Delimiters section. Set Text Qualifier to {none}.
6. Click Next >.
7. In the Text Import Wizard – Step 3 of 3 dialog box, Workforce can specify the data type of each column according to the format, but Excel does a very good job of identifying the data type and configuring each cell accordingly.

8. Click Finish to import the data to a blank spreadsheet. The following is a description of the file format for their reference.
 - Columns must go from left to right in the text file in the sequential order shown in the table.
 - The Column Name does not have to appear in the text file; just the data as described.
 - Each column is separated by one <TAB> (0x09) character. Rows starting with a pound sign (" # ") are ignored.

Column Name	Description																
Time	The time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59.																
Duration	The duration of this period, in seconds. This value is set in Interaction Administrator, Server Parameters container, QueuePeriodStatisticsInterval parameter. By default it is set for 1800 seconds (30 minutes). Do not change it in this file unless Workforce has changed this server parameter when they installed CIC, before they started collecting statistics.																
Workgroup	The name of the ACD workgroup.																
Media	The media type. To enable combinations of the three available media types, each one has been assigned an integer which, when converted to binary, indicates which media type(s) is (are) selected. The following list helps decode "media" column to the combinations of media each integer represents. <table> <tr> <th>Integer Value</th><th>Media Type</th></tr> <tr> <td>1</td><td>Call</td></tr> <tr> <td>2</td><td>Chat</td></tr> <tr> <td>3</td><td>Call, Chat</td></tr> <tr> <td>4</td><td>Email</td></tr> <tr> <td>5</td><td>Call, Email</td></tr> <tr> <td>6</td><td>Chat, Email</td></tr> <tr> <td>7</td><td>Call, Chat, Email</td></tr> </table>	Integer Value	Media Type	1	Call	2	Chat	3	Call, Chat	4	Email	5	Call, Email	6	Chat, Email	7	Call, Chat, Email
Integer Value	Media Type																
1	Call																
2	Chat																
3	Call, Chat																
4	Email																
5	Call, Email																
6	Chat, Email																
7	Call, Chat, Email																
Skills	The skill set used. It can be '*' to represent a summary row, '-' to represent no specific skill, or can be a ' ' separated list.																
#Resources	Number of CSRs, represented by an integer, required to service the route group.																
Shrinkage	Non-excused shrinkage factor.																
ASA	The average speed of answer in seconds.																
SL	Service Level percentage: the number of interactions responded to within the time specified which would be achieved if the number of CSRs indicated in the row were to be taking interactions.																
Occ	Occupancy percentage: the amount of time an CSR would be servicing interactions as a percentage of their total time available to take																

	interactions.
P(0)	Probability of a delay greater than 0 seconds (the probability of not getting an immediate answer).
DlyDly	Average Delay of Delayed Calls. This is the average delay only of those calls that are actually delayed.
AvgQLen1	Average number of interactions in queue at any time, including times when there is no queue.
AvgQLen2	Average number of interactions in queue when all CSRs are busy, i.e., when there actually is a queue.

- **ACD simulation headcount forecast data**

If Workforce export ACD Simulation Headcount Forecast data, the data are saved in the following format.

The below screenshots show data exported from the Headcount Forecast Generation and Modification dialog box when the ACD Simulation method is selected. It is not possible to import this data directly into Excel or some other tool without first separating the data by record types.

```

SimHeadcount.tsv - Notepad
File Edit Format View Help
# Format for simulation generated headcount forecast statistics
# Headcount and shrinkage statistics are given by route group, and each line begins with the letter R
# All other statistics are given by workgroup only, and each line begins with the letter W
#
#R <time>T<duration>T<workgroup>T<media>T<skills>T<#resources>T<shrinkage>
#W <time>T<duration>T<workgroup>T<ASA>T<occ>T<P(0)>T<DlyDly>T<AvgQLen1>T<AvgQLen2>
#
#
# where T is a tab,
# <time> is the time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59
# NOTE: Times are all specified in the time zone local to the user running
# Interaction Administrator. The time is converted from Universal Coordinated Time (UTC)
# on export, and converted back to UTC on import
# all numeric stats apply to interactions that take place from <time> up through the <duration>
# <duration> is the duration of this period, in seconds
# <workgroup> is the name of the ACD workgroup
# <media> is the media type. It must be an integer between 1 and 7. The number represents a
# bitwise-OR'd value of the following media types:
# Call - 1
# Chat - 2
# Email - 4
# <skills> is the skill set used. It can be either empty or '-' to represent no specific skill, or
# can be a '|' separated list.
# <#resources> is the number of agents required for the
# <workgroup>/<media>/<skills> route group
# <shrinkage> is a number used to adjust the number of resources
# required for the <workgroup>/<media>/<skills> route group
# The number of resources is multiplied by the shrinkage factor
# to determine the actual number of resources required.
# <ASA> is the average speed of answer (in seconds) for the
# <workgroup> workgroup
# <SL> is the desired service level (0 - 1, inclusive) for the
# <workgroup> workgroup
# <occ> is the agent occupancy (0 - 1, inclusive) for the
# <workgroup> workgroup
# <P(0)> is the probability of a delay (> 0 seconds) for an interaction to
# be answered (0 - 1, inclusive) for the
# <workgroup> workgroup
# <DlyDly> is the average delay (in seconds) of delayed interactions for the
# <workgroup> workgroup
# <Q1> is the average number of interactions in the queue
# for all time, even when the queue is empty for the
# <workgroup> workgroup
# <Q2> is the average number of interactions in the queue
# when all agents are busy and interactions are queued up
# for the <workgroup> workgroup
#
R 00:00 1800 Client Server Applications Level 1|Client Server Applications Level 2|Email 7 English|Marketing Pro
R 00:00 1800 Client Server Applications Level 1|Client Server Applications Level 2|Email 7 English|Marketing Pro
R 00:00 1800 Client Server Applications Level 1|Email 7 English|Programming Languages|web interfaces 1
R 00:00 1800 Client Server Applications Level 2|Email 7 English|Marketing Products|Operating Systems|Programm
R 00:00 1800 Client Server Applications Level 2|Email 7 English|Marketing Products|Web Interfaces 1

```

SimHeadcount.csv - Notepad

W 01:00 1800	Client Server Applications Level 2	13.028571	0.857143	0.636074	0.171429	76.00
W 01:00 1800	Email 0.000000	1.000000	0.733689	0.000000	0.000000	0.0000
W 01:00 1800	Mainframe Applications Level 1	0.000000	0.000000	0.789093	0.000000	0.000000
W 01:00 1800	Mainframe Applications Level 2	0.000000	1.000000	0.804222	0.000000	0.000000
W 01:30 1800	Client Server Applications Level 1	9.226415	0.888889	0.730194	0.207547	44.45
W 01:30 1800	Client Server Applications Level 2	0.000000	1.000000	0.632407	0.000000	0.0000
W 01:30 1800	Email 0.000000	0.000000	0.634382	0.000000	0.000000	0.0000
W 01:30 1800	Mainframe Applications Level 1	0.000000	1.000000	0.603259	0.000000	0.000000
W 01:30 1800	Mainframe Applications Level 2	17.500000	0.833333	0.625667	0.134615	130.000000
W 02:00 1800	Client Server Applications Level 1	22.208589	0.823171	0.710727	0.177914	124.8
W 02:00 1800	Client Server Applications Level 2	0.000000	0.000000	0.775683	0.000000	0.0000
W 02:00 1800	Email 0.000000	0.000000	0.745043	0.000000	0.000000	0.0000
W 02:00 1800	Mainframe Applications Level 1	0.000000	1.000000	0.703531	0.000000	0.000000
W 02:00 1800	Mainframe Applications Level 2	0.000000	1.000000	0.777648	0.000000	0.000000
W 02:30 1800	Client Server Applications Level 1	2.581818	0.963636	0.779864	0.054545	47.33
W 02:30 1800	Client Server Applications Level 2	0.000000	1.000000	0.782487	0.000000	0.0000
W 02:30 1800	Email 0.000000	0.000000	0.749652	0.000000	0.000000	0.0000
W 02:30 1800	Mainframe Applications Level 1	0.000000	1.000000	0.747556	0.000000	0.000000
W 02:30 1800	Mainframe Applications Level 2	0.000000	0.000000	0.747556	0.000000	0.000000
W 03:00 1800	Client Server Applications Level 1	4.656250	0.947917	0.591508	0.067708	68.76
W 03:00 1800	Client Server Applications Level 2	0.000000	0.000000	0.622567	0.000000	0.0000
W 03:00 1800	Email 0.000000	0.000000	0.694213	0.000000	0.000000	0.0000
W 03:00 1800	Mainframe Applications Level 1	0.000000	1.000000	0.853975	0.000000	0.000000
W 03:00 1800	Mainframe Applications Level 2	0.000000	0.000000	0.853975	0.000000	0.000000
W 03:30 1800	Client Server Applications Level 1	17.403509	0.824561	0.729765	0.192982	90.18
W 03:30 1800	Client Server Applications Level 2	5.611111	0.958333	0.683867	0.055556	101.0
W 03:30 1800	Email 0.000000	0.000000	0.700323	0.000000	0.000000	0.0000
W 04:00 1800	Client Server Applications Level 1	25.771429	0.857143	0.581917	0.142857	180.4
W 04:00 1800	Client Server Applications Level 2	0.000000	0.000000	0.670278	0.000000	0.0000
W 04:00 1800	Email 0.000000	1.000000	0.586514	0.000000	0.000000	0.0000
W 04:00 1800	Mainframe Applications Level 1	12.711538	0.907407	0.591111	0.076923	165.250000
W 04:00 1800	Mainframe Applications Level 2	0.000000	0.000000	0.591111	0.000000	0.000000
W 04:30 1800	Client Server Applications Level 1	6.980952	0.933962	0.633980	0.095238	73.30
W 04:30 1800	Client Server Applications Level 2	5.939024	0.926829	0.640361	0.085366	69.57
W 04:30 1800	Email 0.000000	0.000000	0.635845	0.000000	0.000000	0.0000
W 04:30 1800	Mainframe Applications Level 1	0.000000	1.000000	0.731286	0.000000	0.000000
W 04:30 1800	Mainframe Applications Level 2	0.000000	0.000000	0.731286	0.000000	0.000000
W 05:00 1800	Client Server Applications Level 1	0.000000	0.000000	0.532889	0.000000	0.0000
W 05:00 1800	Client Server Applications Level 2	0.000000	1.000000	0.507306	0.000000	0.0000
W 05:00 1800	Email 0.000000	0.000000	0.563556	0.000000	0.000000	0.0000
W 05:00 1800	Mainframe Applications Level 1	0.000000	0.000000	0.637417	0.000000	0.000000
W 05:00 1800	Mainframe Applications Level 2	15.278689	0.887097	0.608556	0.114754	133.142857
W 05:30 1800	Client Server Applications Level 1	0.000000	1.000000	0.536531	0.000000	0.0000
W 05:30 1800	Client Server Applications Level 2	16.075949	0.881250	0.562111	0.132911	120.9
W 05:30 1800	Email 0.000000	0.000000	0.564024	0.000000	0.000000	0.0000
W 05:30 1800	Mainframe Applications Level 1	0.000000	0.000000	0.682159	0.000000	0.000000
W 05:30 1800	Mainframe Applications Level 2	0.000000	1.000000	0.670528	0.000000	0.000000
W 06:00 1800	Client Server Applications Level 1	0.000000	0.000000	0.735630	0.000000	0.0000
W 06:00 1800	Client Server Applications Level 2	0.690476	0.976190	0.683323	0.023810	29.00
W 06:00 1800	Email 0.000000	0.000000	0.657289	0.000000	0.000000	0.0000
W 06:00 1800	Mainframe Applications Level 1	0.000000	0.000000	0.618222	0.000000	0.000000
W 06:00 1800	Mainframe Applications Level 2	28.462687	0.835821	0.618222	0.179104	158.916667

- Below is a description of each record type for their reference:
- Columns must go from left to right in the text file in the sequential order shown in the table.
 - The Column Name does not have to appear in the text file; just the data as described.
 - Each column is separated by one <TAB> (0x09) character.
 - Rows starting with a pound sign (" # ") are ignored.
 - The following is a description of the "R" (route group) records in the exported file:

Column Name	Description
Time	The time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59.
Duration	This is the duration of this period, in seconds.
Workgroup	This is the name of the ACD workgroup.
Media	This is the media type. To enable combinations of the three available media types, each one has been assigned an integer which, when converted to binary, indicates which media type(s) is (are) selected. The following list helps decode "media" column to the combinations of media each integer represents.

	<table> <tr> <th>Integer Value</th><th>Media Type</th></tr> <tr> <td>1</td><td>Call</td></tr> <tr> <td>2</td><td>Chat</td></tr> <tr> <td>3</td><td>Call, Chat</td></tr> <tr> <td>4</td><td>Email</td></tr> <tr> <td>5</td><td>Call, Email</td></tr> <tr> <td>6</td><td>Chat, Email</td></tr> <tr> <td>7</td><td>Call, Chat, Email</td></tr> </table>	Integer Value	Media Type	1	Call	2	Chat	3	Call, Chat	4	Email	5	Call, Email	6	Chat, Email	7	Call, Chat, Email
Integer Value	Media Type																
1	Call																
2	Chat																
3	Call, Chat																
4	Email																
5	Call, Email																
6	Chat, Email																
7	Call, Chat, Email																
Skills	This is the skill set used. It can be '*' to represent a summary row, '-' to represent no specific skill, or can be a ' ' separated list.																
#Resources	This is the number of CSRs, represented by an integer, required to handle all interactions in the staffing group.																
Shrinkage	This is the calculation to factor in unscheduled events during a shift, such as a long break or longer than expected lunch. It is also called the Non-excused shrinkage factor.																

- The following is a description of the "W" (workgroup or Staffing Group) records in the exported file:

Column Name	Description
Time	The time of day in HH:MM. Hours are in 24 hour time (00 - 23), and minutes are 00-59. Times are all specified in the time zone local to the user running Interaction Administrator. The time is converted from Coordinated Universal Time (UTC) on export, and converted back to UTC on import.
Duration	The duration of this period, in seconds.
Workgroup	The name of the ACD workgroup.
ASA	The average speed of answer in seconds for all interactions.
Occ	The Occupancy percentage. It is the amount of time each CSR would be handling interactions during the specified time interval as a percentage of their total time available to take interactions.
P(0)	The probability of a delay greater than 0 seconds, meaning the probability of not getting an immediate answer.
DlyDly	The average delay of all calls that were actually delayed.

AvgQLen1	The average number of interactions in queue at any given time, including times when there are no interactions in queue.
AvgQLen2	The average number of interactions in queue when all CSRs are busy and there actually are interactions in queue.

- **Importing ACD simulation headcount forecast data**

There are two record types in one text file required to import simulation data (see preceding file format). Data imported to this grid will either replace existing data which match the specified Staffing Group and time slice, or it will append data with a Staffing Group and time slice not present in the current data. It will not merge data which match an existing Staffing Group and time slice row.

Warning: Only the staffing group records ("R" recordtype) will be imported during an import procedure. Workgroup records ("W" recordtype) may be exported but not imported.

3.1.4.Schedule Generation and Administration

- **Headcount forecast methods**

Schedule Generation and Administration is the process of generating a preliminary schedule then adjusting it for information not available to the scheduling engine, such as new marketing campaigns, catalog drops, bill due dates and other factors. Additionally, the Supervisor may notice that weekly shift constraints or specific CSR exception shift constraints sometimes cause unworkable schedules to be generated. Maintenance of this configuration data may be necessary and a schedule may need to be regenerated to have a workable starting point. Or they may need to make only minor adjustments by hand to the generated schedule before publishing it.

- **Working with schedules**

Generate new schedules in the Interaction Optimizer module, available in IC Business Manager. In addition, use the Interaction Optimizer module to publish, make changes to, and remove existing schedules. For more information, see the Interaction Optimizer online help.

- **Copy**

The Supervisor can copy (and optionally rename) a schedule from another forecast schedule entry. This will also copy the associated headcount forecast, volume forecast, and day selections data.

1. Click Copy From... on the Scheduling dialog box. The Copy Schedule page appears.

Copy Schedule

Select the schedule to copy from by first selecting the Forecast Schedule Entry to which it belongs, then selecting the desired schedule. To copy the schedule with a different name, enter the new name in the text box below.

Schedules:

Name	Week Of
test7	3/10/2008
Schedule from Sim	
Schedule from Erlang	
Schedule from Sim	
Schedule from Erlang	
Future Test	2/25/2008
test5	2/11/2008
test4	1/28/2008
test3	1/14/2008
test	12/31/2007

Copy as:

OK

Cancel

• Duplicate...

Workforce can duplicate both published and pending schedules. They can also duplicate an unpublished schedule to experiment with it without making changes to the original.

If a schedule is currently in effect, they can publish only a copy of the currently published schedule.

1. In the Scheduling Unit dialog box, select the Scheduling step and click the Scheduling... button. In the Scheduling dialog box, select a schedule name and click Duplicate.... The duplicated schedule appears.
2. If any time off requests were approved between the time the schedule was generated and when the Supervisor copy it, the Apply Time Off Requests dialog box appears.

Apply Time Off Requests

The time off requests listed below have not yet been applied to this schedule. Would you like to apply them now?

Agent	Type	Length	Start Time	Stop Time
LeftyF	Full Day	08:00	10/23/2006	10/23/2006

Note: If "No" is chosen and this schedule is saved, you will not be prompted to apply the listed requests again, which may result in the agent(s) being scheduled during the requested time off period(s).

Yes

No

3. Do one of the following:
 - Click Yes to apply the listed time off requests to the schedule.
 - Click No to avoid applying the listed time off requests to the schedule.

Warning: If Workforce chooses not to apply the listed time off requests, they will not be prompted again to apply them. This can result in CSRs being scheduled during approved time off periods.

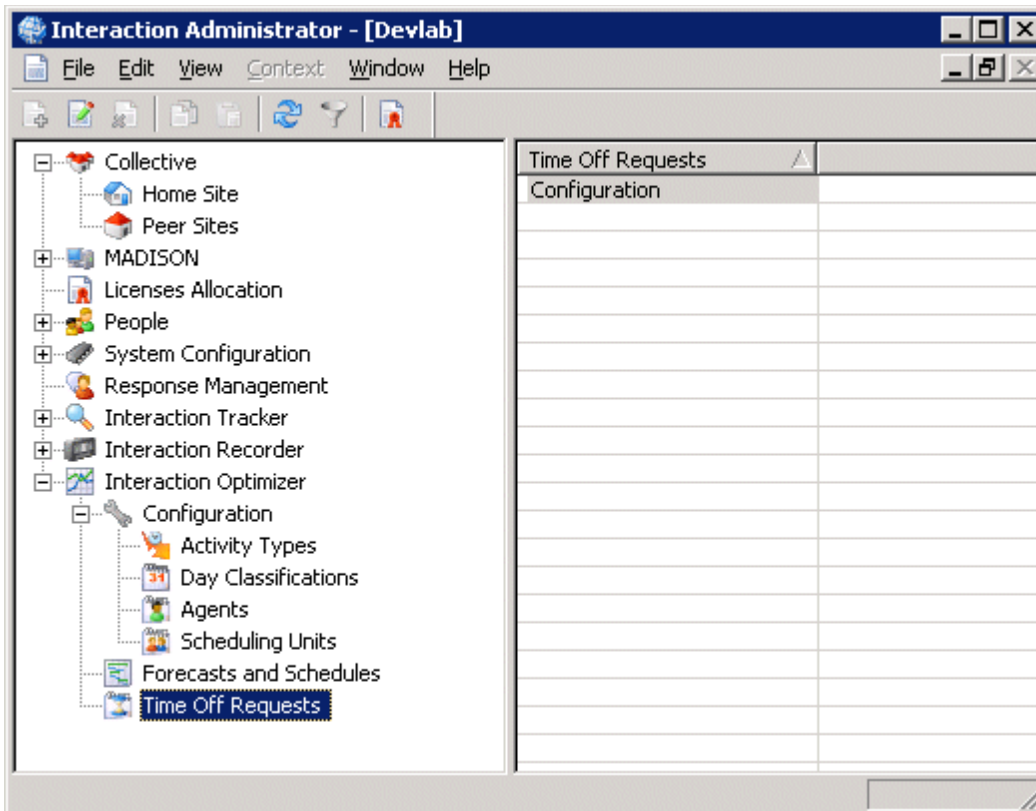
3.1.5. Time Off Requests

Time off requests recorded and approved in the Time Off Requests container in Interaction Administrator are automatically included in the calculations for generating a schedule.

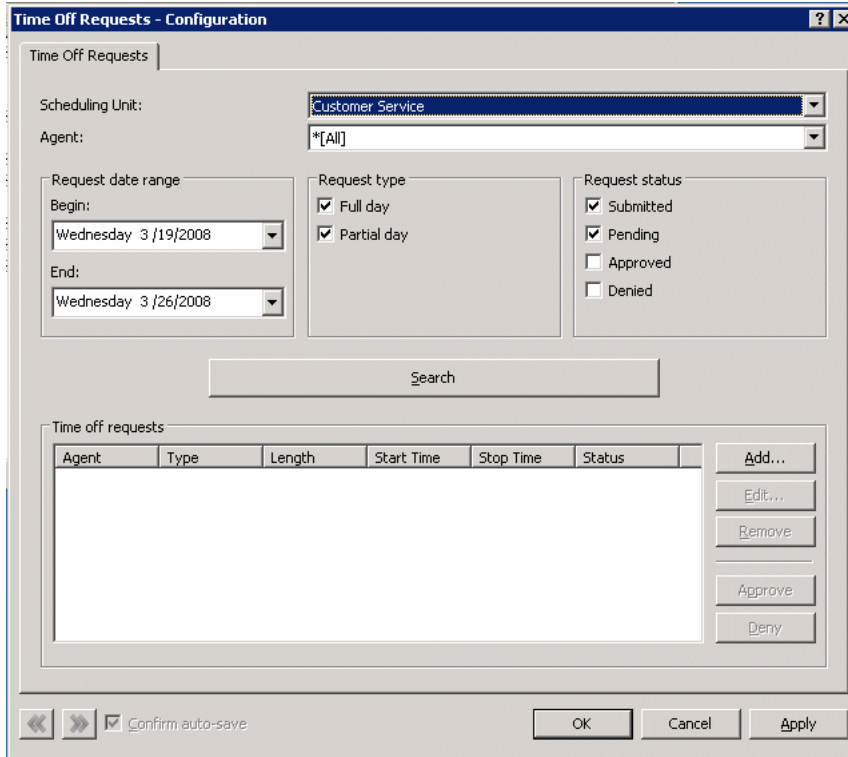
- **Processing time off requests**

Workforce works with time off requests in the Interaction Administrator Time Off Requests sub-container. All of the procedures in this section begin with accessing this container.

1. In Interaction Administrator, expand the Interaction Optimizer container.
2. Select the Time Off Requests sub-container.



3. In the right-hand pane, double-click Configuration. The Time Off Requests – Configuration dialog box appears.



Time Off Requests - Configuration

Time Off Requests

Scheduling Unit: Customer Service

Agent: *[All]

Request date range

Begin: Wednesday 3 /19/2008

End: Wednesday 3 /26/2008

Request type

☒ Full day

☒ Partial day

Request status

☒ Submitted

☒ Pending

☐ Approved

☐ Denied

Search

Time off requests

Agent	Type	Length	Start Time	Stop Time	Status

Add...

Edit...

Remove

Approve

Deny

Confirm auto-save

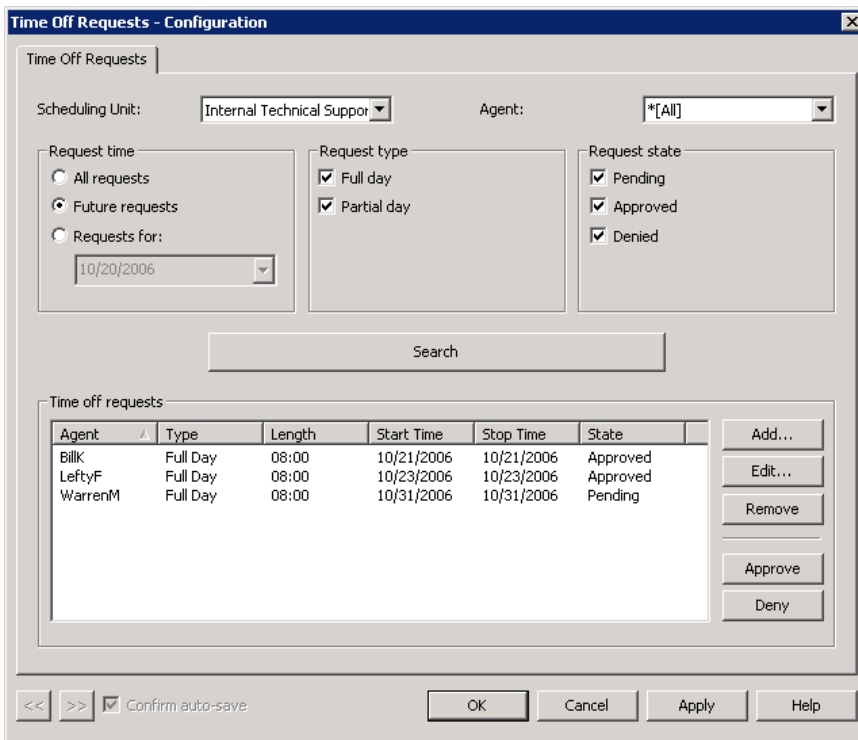
OK Cancel Apply

4. Continue with instructions in the following sections, to search for, add, edit, remove, approve or deny time off requests.

- **Search for a request**

The first step in editing, removing, approving or denying time off requests is to locate the appropriate requests.

1. In the Time Off Requests – Configuration dialog box, select the appropriate scheduling unit from the drop down list.
2. From the Agent (also known as a Customer Service Representative [CSR]) dropdown list, do one of the following:
 - Select a specific CSR.
 - Select all CSRs in a designated workgroup.
3. In the Request section, select a begin date in Begin: and select an end date in End.
4. In the Request type section, select Full day or Partial day or both types of time off request.
5. In the Request status section, select any or all of the possible time off request states: Pending, Approved, or Denied.
6. After Workforce selects the search parameters, click the Search button. Time off requests that match their search criteria appear in the Time Off Requests list.



Time Off Requests - Configuration

Time Off Requests

Scheduling Unit: Internal Technical Support Agent: *[All]

Request time

☐ All requests

☒ Future requests

☐ Requests for: 10/20/2006

Request type

☒ Full day

☒ Partial day

Request state

☒ Pending

☒ Approved

☒ Denied

Search

Time off requests

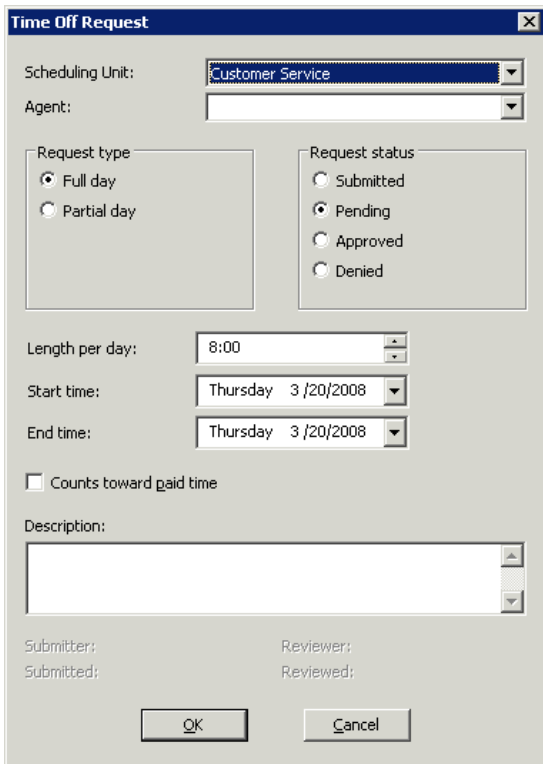
Agent	Type	Length	Start Time	Stop Time	State
Bilk	Full Day	08:00	10/21/2006	10/21/2006	Approved
LeftyF	Full Day	08:00	10/23/2006	10/23/2006	Approved
WarrenM	Full Day	08:00	10/31/2006	10/31/2006	Pending

Add... Edit... Remove Approve Deny

<< >> ☒ Confirm auto-save OK Cancel Apply Help

• Add a request

1. In the Time Off Requests – Configuration dialog box, click Add.... The Time Off Request dialog box appears.



2. From the Scheduling Unit dropdown list, select the appropriate scheduling unit.
3. In the Request type section, select Full day or Partial day as appropriate for this time off request. Note: The default start time for partial time off requests is the shift start time.
4. In the Request status section, select the appropriate time off request state: Submitted, Pending, Approved, or Denied.
5. Select the days covered by this time off request in the Start time and End time boxes.
6. Select the Counts toward paid time checkbox, if appropriate.
7. In the Description box, enter any notes for this time off request.
8. Click OK. The time off request appears in the Time off requests list in the Time Off Requests – Configuration dialog box.

• Edit a Request

1. In the Time Off Requests – Configuration dialog box, search for the time off request Workforce wants to edit.
2. From the Time off requests list, select a time off request and click Edit.... The Time Off Request dialog box appears.
3. Make any necessary changes and click OK.

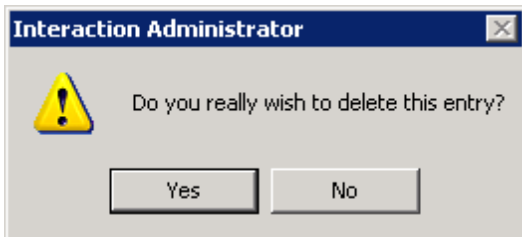
- **Delete, approve, or deny requests**

Time off requests must be in an approved status in order to be considered when a schedule is generated. Workforce cannot change the state of approved or denied requests, but can remove them.

1. In the Time Off Requests – Configuration dialog box, search for the time off request Workforce wants to edit. From the Time off requests list, select a time off request and do one of the following: To change the time off request state to Approved, select a Submitted or Pending time off request and click Approve. To change the time off request state to Denied, select a Submitted or Pending time off request and click Deny. To delete a time off request, select a time off request and click Remove.
2. When they have completed managing the selected time off requests, in the Time Off Requests – Configuration dialog box, click Apply and then click OK.

- **Delete a previously denied request**

1. In the Time Off Requests – Configuration dialog box, search for the previously denied time off request by selecting Denied in the Request state section.
2. Set the other search criteria as appropriate.
3. Click Search.
4. From the Time off requests list, select the previously-denied time off request and click Remove.
5. When prompted “Do you really wish to delete this entry...” click on Yes.



6. Add a new time off request for the appropriate date and CSR and approve this new request.

3.1.6.Reports

- **Report 1 - Adherence Detail by Date/User:** This report displays historical data of Adherence exceptions by date and user. The report is sorted by Scheduled Unit and includes individual activity detail. It also displays the exceptions as Early, Late, or Unscheduled activities--for example, if a CSR went to an activity early or late from a scheduled activity. Two additional columns in the report, From Activity and To Activity, display the activities before and after the exception occurred.

Adherence Detail by Date

Unit: I-xxx
Users: I-xxx

INTERACTIVE INTELLIGENCE

Date/Time Range: 01/05/2006 00:00:00 - 09/09/2010 23:59:59
Current Sensitivity Threshold (hh:mm:ss): 0:01:00

Totals include only exceptions within the Shift

Date/Time	Scheduled Activity	From Activity	To Activity	Duration hh:mm:ss
Unit: Customer Service - Help Desk				
1/23/2009				
Exceptions:	415	39:25:50		
Mark.Malin				
Shift:	3:00 am - 4:00 pm			Time Scheduled: 10:00:00
Exceptions:	13	01:26:50		
Unscheduled				
Exceptions:	0	:00:00		
1/23/2009 4:24:22PM	Unscheduled	Scheduled ACD	Scheduled ACD	03:43
1/23/2009 4:28:05PM	Unscheduled	Scheduled ACD	Scheduled ACD	01:15
Logged out				
Exceptions:	0	:00:00		
1/23/2009 4:00:00PM	Unscheduled	Scheduled ACD	Scheduled ACD	05:36
Melissa.Greeves				
Shift:	3:00 am - 3:30 pm			Time Scheduled: 10:30:00
Exceptions:	14	01:56:31		
Early				
Exceptions:	10	01:01:58		
1/23/2009 12:29:59PM	Scheduled ACD	Scheduled ACD	Break	:15:00
1/23/2009 1:00:43PM	Break	Scheduled ACD	Scheduled ACD	05:05
1/23/2009 1:07:09PM	Break	Scheduled ACD	Scheduled ACD	03:33
1/23/2009 1:10:42PM	Break	Scheduled ACD	Scheduled ACD	04:18
1/23/2009 2:35:35PM	Meal	Scheduled ACD	Scheduled ACD	05:11
1/23/2009 2:42:05PM	Meal	Scheduled ACD	Scheduled ACD	05:59
1/23/2009 2:48:05PM	Meal	Scheduled ACD	Scheduled ACD	02:08
1/23/2009 2:50:33PM	Meal	Scheduled ACD	Scheduled ACD	02:25
1/23/2009 5:35:01PM	Break	Scheduled ACD	Scheduled ACD	03:09
1/23/2009 5:38:10PM	Break	Scheduled ACD	Scheduled ACD	05:05
Late				
Exceptions:	3	:24:34		
1/23/2009 2:30:00PM	Meal	Scheduled ACD	Scheduled ACD	05:35
1/23/2009 5:30:00PM	Break	Scheduled ACD	Scheduled ACD	04:00
1/23/2009 6:00:00PM	Training	Break	Break	:14:59
Skipped				
Exceptions:	1	:29:59		
1/23/2009 3:00:00PM	Scheduled ACD	Meal	Meal	:29:59
Monty.Sanders				
Shift:	3:00 am - 3:15 pm			Time Scheduled: 10:15:00
Exceptions:	11	:44:19		
Early				
Exceptions:	9	:37:57		
1/23/2009 12:29:59PM	Scheduled ACD	Scheduled ACD	Break	:15:00

Print Date: Tuesday, September 09, 2010 11:36:35AM

Page 665 of 4,294,967,295

Print Date: Thursday, September 09, 2010 11:36:35AM

Page 665 of 4,294,967,295

- **Report 2 - Adherence Detail by User/Date:** The Adherence Detail by User/Date report contains historical data of CSRs' exceptions to their Interaction Optimizer published schedules. CSR work shift activities, such as breaks, meals, meetings, and scheduled ACD, are included in Interaction Optimizer generated schedules. When a CSR's status does not match that CSR's scheduled activity, an exception is generated. This report displays historical data of Adherence exceptions by user and date. The report also displays the exceptions as Early, Late, or Unscheduled activities--for example, if a CSR went to an activity early or late from a scheduled activity. Two additional columns in the report, From Activity and To Activity, display the activities before and after the exception occurred.

Adherence Detail by User

Unit: I-zzz
Users: I-zzz

INTERACTIVE INTELLIGENCE

Date/Time Range: 01/05/2006 00:00:00 - 09/09/2010 23:59:59
Current Sensitivity Threshold (h:mm:ss): 0:01:00

Totals include only exceptions within the Shift

Date/Time	Scheduled Activity	From Activity	To Activity	Duration hh:mm:ss
-----------	--------------------	---------------	-------------	----------------------

Unit: Customer Service - Help Desk

Bob.Tomatoe

Exceptions: 6026 3139:28:10

Total week: 8/22/2010 - 8/28/2010

Exceptions: 56 39:44:08

8/22/2010	Shift: 00 pm - 00 am	Time Scheduled:	06:00:00
-----------	----------------------	-----------------	----------

Exceptions: 5 :13:06

Unscheduled

Exceptions: 0 :00:00

8/22/2010	1:44:03AM	Unscheduled	Scheduled ACD	Scheduled ACD	02:09
-----------	-----------	-------------	---------------	---------------	-------

8/22/2010	1:48:07AM	Unscheduled	Scheduled ACD	Scheduled ACD	01:41
-----------	-----------	-------------	---------------	---------------	-------

8/22/2010	1:49:59AM	Unscheduled	Scheduled ACD	Scheduled ACD	01:04
-----------	-----------	-------------	---------------	---------------	-------

8/22/2010	1:51:14AM	Unscheduled	Scheduled ACD	Scheduled ACD	02:34
-----------	-----------	-------------	---------------	---------------	-------

8/22/2010	1:53:59AM	Unscheduled	Scheduled ACD	Scheduled ACD	04:09
-----------	-----------	-------------	---------------	---------------	-------

8/22/2010	1:58:19AM	Unscheduled	Scheduled ACD	Scheduled ACD	01:41
-----------	-----------	-------------	---------------	---------------	-------

Skipped

Exceptions: 1 :01:33

8/22/2010	12:00:03AM	Unscheduled	Scheduled ACD	Scheduled ACD	01:21
-----------	------------	-------------	---------------	---------------	-------

8/22/2010	8:45:00PM	Break	Scheduled ACD	Scheduled ACD	01:33
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	Shift: 00 pm - 1:30 am	Time Scheduled:	10:30:00
-----------	------------------------	-----------------	----------

Exceptions: 22 01:33:50

Early

Exceptions: 20 01:01:48

8/23/2010	12:02:13AM	Meal	Scheduled ACD	Scheduled ACD	03:59
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:05:23AM	Meal	Scheduled ACD	Scheduled ACD	01:29
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:08:03AM	Meal	Scheduled ACD	Scheduled ACD	03:59
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:12:13AM	Meal	Scheduled ACD	Scheduled ACD	03:19
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:15:43AM	Meal	Scheduled ACD	Scheduled ACD	03:59
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:19:53AM	Meal	Scheduled ACD	Scheduled ACD	02:59
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:24:34AM	Meal	Scheduled ACD	Scheduled ACD	01:05
-----------	------------	------	---------------	---------------	-------

8/23/2010	12:25:49AM	Meal	Scheduled ACD	Scheduled ACD	04:11
-----------	------------	------	---------------	---------------	-------

8/23/2010	2:00:03AM	Break	Scheduled ACD	Scheduled ACD	01:09
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	2:02:13AM	Break	Scheduled ACD	Scheduled ACD	02:39
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	2:05:03AM	Break	Scheduled ACD	Scheduled ACD	01:19
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	2:07:33AM	Break	Scheduled ACD	Scheduled ACD	01:59
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	2:10:23AM	Break	Scheduled ACD	Scheduled ACD	02:09
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	2:13:45AM	Break	Scheduled ACD	Scheduled ACD	01:15
-----------	-----------	-------	---------------	---------------	-------

8/23/2010	10:31:05PM	Meal	Scheduled ACD	Scheduled ACD	04:11
-----------	------------	------	---------------	---------------	-------

8/23/2010	10:35:27PM	Meal	Scheduled ACD	Scheduled ACD	04:41
-----------	------------	------	---------------	---------------	-------

8/23/2010	10:41:17PM	Meal	Scheduled ACD	Scheduled ACD	04:39
-----------	------------	------	---------------	---------------	-------

8/23/2010	10:46:07PM	Meal	Scheduled ACD	Scheduled ACD	04:19
-----------	------------	------	---------------	---------------	-------

Print Date: Thursday, September 09, 2010 11:45:36 AM

Page 1,313 of 4,294,967,295

- **Report 3 - Adherence Summary by Date/User:** The Adherence Summary by Date/User report contains historical data of CSRs' exceptions to their Interaction Optimizer published schedules. CSR work shift activities, such as breaks, meals, meetings, and scheduled ACD, are included in Interaction Optimizer generated schedules. When an CSR's status does not match that CSR's scheduled activity, an exception is generated. This report displays a summary of historical data of Adherence exceptions including the date and user. The report also displays a summary of the exceptions as early, Late, or Unscheduled activities.

Adherence Summary Percentage by Date/User						
Scheduling Unit: I-zzz Users: I-zzz Date/Time Range: 01/05/2006 00:00:00 - 09/09/2010 23:59:59 Current Sensitivity Threshold (hh:mm:ss) : 0:01:00						
User	Scheduled Time hh:mm	Total Exceptions	# Exceptions ≥ 0:01:00	Out of Adherence hh:mm:ss	%Out Adherence	%In Adherence
Scheduling Unit: Customer Service - Help Desk						
1/17/2009						
Jasra, Lee	10:30	21	21	11:40:29	(111.19%)	(-11.19%)
Jeanette R. Dearborne	10:30	25	25	11:36:35	(110.51%)	(-10.51%)
Jeremy Carter	10:30	22	22	11:23:04	(108.42%)	(-8.42%)
John Carr	10:30	18	18	26:00:00	(247.62%)	(-147.62%)
Jill Smith	10:30	18	18	11:25:27	(108.96%)	(-8.96%)
Karl Stokeling	10:30	21	21	11:25:52	(108.81%)	(-8.81%)
Kathy Johnson	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Kevin Smith	10:30	10	10	18:00:00	(171.43%)	(-71.43%)
Larry Wall	10:30	22	22	11:25:49	(108.86%)	(-8.86%)
Linda Herr	23:59	4	4	47:58:00	(200.00%)	(-100.00%)
Linda Zollar	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Lea Schwartz	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Lea Weed	10:30	16	16	23:00:00	(219.05%)	(-19.05%)
Melissa Greaves	10:30	27	27	11:36:15	(110.99%)	(-10.99%)
Molly Sanders	10:30	23	23	11:42:10	(111.46%)	(-11.46%)
Randy Cox	10:30	28	28	11:38:40	(110.90%)	(-10.90%)
Ronda Mallis	10:30	23	23	11:25:24	(108.79%)	(-8.79%)
Sandra Young	10:30	22	22	11:22:36	(108.35%)	(-8.35%)
Sarah Montgomery	10:15	20	19	11:05:29	(108.70%)	(-8.70%)
Stella Miller	10:30	18	18	21:00:00	(200.00%)	(-100.00%)
Stevie Stokeling	10:30	18	18	26:00:00	(247.62%)	(-147.62%)
Steve Simms	10:30	10	10	14:30:00	(138.10%)	(-38.10%)
Tony Schwartz	10:30	16	16	21:00:00	(200.00%)	(-100.00%)
Summary of week ending on 1/17/2009 for selected users on this Scheduling unit:						
# Users:	36	2298:14	2,740	2733	2261:44:44	(98.37%) (1.63%)
1/18/2009						
Bob Tomate	10:30	12	12	21:00:00	(200.00%)	(-100.00%)
Dak, Pence	06:15	6	6	06:29:50	(103.96%)	(-3.96%)
Dave Johnson	10:30	10	10	19:00:00	(180.95%)	(-80.95%)
Doig, Myrgrat	10:30	21	21	11:27:53	(109.19%)	(-9.19%)
Elizabeth Sanders	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Gloria Aude	08:00	14	14	16:00:00	(200.00%)	(-100.00%)
Jasra, Lee	10:30	12	12	16:00:00	(152.38%)	(-52.38%)
Jasra, Lee	10:30	25	25	11:41:10	(111.30%)	(-11.30%)
Jeanette R. Dearborne	10:30	27	27	11:40:20	(111.16%)	(-11.16%)
Jeremy Carter	10:30	22	22	11:22:12	(108.29%)	(-8.29%)
John Carr	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Jill Smith	10:30	20	20	11:25:25	(108.80%)	(-8.80%)
Karl Stokeling	10:30	16	16	11:25:44	(108.85%)	(-8.85%)
Kathy Johnson	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Kevin Smith	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Larry Wall	10:30	20	20	11:24:31	(108.65%)	(-8.65%)
Linda Herr	07:30	11	11	09:57:24	(132.76%)	(-32.76%)
Print Date: Thursday, September 09, 2010 11:49:02 AM						
Page 11 of 14,294,967,295						

***Note:** Reports 1 through 3 has the parameters of Specify a Unit Name and a start and end range to include in a report. Workforce can also specify a Date and Time range, and user names to include in a report.

- **Report 4 - Adherence Summary Percentage by Date/User:** This report displays duration, total of exceptions, percentage in and out of adherence by date, and users in the scheduling unit. The report is sorted by Date and then by User.

Adherence Summary Percentage by Date/User

Scheduling Unit: I-222
Users: I-222



INTERACTIVE INTELLIGENCE

Date/Time Range: 01/05/2006 00:00:00 - 09/09/2010 23:59:59
Current Sensitivity Threshold (hh:mm:ss) : 0:01:00

User	Scheduled Time hh:mm	Total Exceptions	# Exceptions > 0:01:00	Out of Adherence hh:mm:ss	%Out Adherence	%In Adherence
------	-------------------------	---------------------	---------------------------	------------------------------	-------------------	------------------

Scheduling Unit: Customer Service - Help Desk

1/17/2009

Jason Lee	10:30	21	21	11:40:29	(111.19%)	(-11.19%)
Jeffrey Dearborne	10:30	25	25	11:26:35	(110.57%)	(-10.57%)
Jeremy Carter	10:30	22	22	11:23:04	(108.42%)	(-8.42%)
John Carr	10:30	18	18	25:00:00	(247.62%)	(-147.62%)
Jill Smith	10:30	18	18	11:26:27	(108.96%)	(-8.96%)
Karl Stokeling	10:30	21	21	11:25:52	(108.87%)	(-8.87%)
Kathy Johnson	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Kevin Smith	10:30	10	10	18:00:00	(171.43%)	(-71.43%)
Larry Wall	10:30	22	22	11:25:49	(108.86%)	(-8.86%)
Linda Herr	23:59	4	4	47:58:00	(200.00%)	(-100.00%)
Linda Zollar	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Lea Schwartz	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Lea Weed	10:30	16	16	23:00:00	(219.05%)	(-19.05%)
Melissa Greaves	10:30	27	27	11:29:15	(110.99%)	(-10.99%)
Molly Sanders	10:30	23	23	11:42:10	(111.46%)	(-11.46%)
Randy Cox	10:30	28	28	11:38:40	(110.90%)	(-10.90%)
Ronda Mall	10:30	23	23	11:25:24	(108.79%)	(-8.79%)
Sandra Young	10:30	22	22	11:22:36	(108.35%)	(-8.35%)
Sarah Montgomery	10:15	20	19	11:08:29	(108.70%)	(-8.70%)
Shelia Miller	10:30	18	18	21:00:00	(200.00%)	(-100.00%)
Sherry Stokeling	10:30	18	18	25:00:00	(247.62%)	(-147.62%)
Steve Simms	10:30	10	10	14:30:00	(138.10%)	(-38.10%)
Tony Schwartz	10:30	16	16	21:00:00	(200.00%)	(-100.00%)

Summary of week ending on 1/17/2009 for selected users on this Scheduling unit:
Users: 36 2299:14 2,740 2733 2261:44:44 (98.37%) (1.63%)

1/18/2009

Bob Tomate	10:30	12	12	21:00:00	(200.00%)	(-100.00%)
Dak Preece	05:15	6	6	05:29:50	(103.96%)	(-3.96%)
Dave Johnson	10:30	10	10	19:00:00	(180.95%)	(-80.95%)
Doug Mygrat	10:30	21	21	11:27:53	(109.19%)	(-9.19%)
Elizabeth Sanders	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Gino Andie	08:00	14	14	16:00:00	(200.00%)	(-100.00%)
Jason Batta	10:30	12	12	16:00:00	(152.38%)	(-52.38%)
Jason Lee	10:30	26	26	11:41:10	(111.30%)	(-11.30%)
Jeffrey Dearborne	10:30	27	27	11:40:20	(111.16%)	(-11.16%)
Jeremy Carter	10:30	22	22	11:22:12	(108.29%)	(-8.29%)
John Carr	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Jill Smith	10:30	20	20	11:25:25	(108.80%)	(-8.80%)
Karl Stokeling	10:30	16	16	11:25:44	(108.85%)	(-8.85%)
Kathy Johnson	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Kevin Smith	10:30	14	14	21:00:00	(200.00%)	(-100.00%)
Larry Wall	10:30	20	20	11:24:31	(108.65%)	(-8.65%)
Linda Herr	07:30	11	11	09:57:24	(132.76%)	(-32.76%)

Print Date: Thursday, September 09, 2010 11:49:02AM

Page 11 of 14,294,967,295

- **Report 5 - Adherence Summary Percentage by User/Date:** This report displays duration, total of exceptions, percentage in and out of adherence by date, and users in the scheduling unit. The report is sorted by User and then by Date.

Adherence Summary Percentage by User/Date

Scheduling Unit: I-zzz

Users: I-zzz

Date/Time Range: 01/05/2008 00:00:00 - 09/09/2010 23:59:59

Current Sensitivity Threshold (hh:mm:ss): 0:01:00



INTERACTIVE INTELLIGENCE

User	Scheduled Time hh:mm	Total Exceptions	# Exceptions ≥ 0:01:00	Out of Adherence hh:mm:ss	%Out Adherence	%In Adherence
------	-------------------------	---------------------	---------------------------	------------------------------	-------------------	------------------

Scheduling Unit: Customer Service - Help Desk

Beth.Collier

*Weekly summary for user: Beth.Collier ending on: 7/25/2009 :

	53:00	56	154	44:04:45	(83.17%)	(16.83%)
7/26/2009	10:00	12	36	04:41:25	(46.90%)	(53.10%)
7/27/2009	10:30	17	49	05:21:34	(51.04%)	(48.96%)
7/28/2009	07:00	15	49	02:20:13	(33.38%)	(66.62%)
7/30/2009	07:00	15	51	01:49:56	(26.17%)	(73.83%)
7/31/2009	10:30	19	84	51:36	(6.20%)	(93.80%)
8/1/2009	08:00	9	60	42:15	(8.80%)	(91.20%)

*Weekly summary for user: Beth.Collier ending on: 8/1/2009 :

	53:00	87	329	15:47:01	(29.78%)	(70.22%)
8/2/2009	09:30	12	62	57:27	(10.08%)	(89.92%)
8/3/2009	09:30	18	77	45:36	(6.00%)	(94.00%)
8/4/2009	07:00	14	56	01:17:57	(18.56%)	(81.44%)
8/5/2009	10:00	14	20	01:18:40	(13.11%)	(86.89%)
8/6/2009	07:00	7	9	06:01:26	(86.06%)	(13.94%)
8/7/2009	10:00	23	30	04:55:22	(49.23%)	(50.77%)

*Weekly summary for user: Beth.Collier ending on: 8/7/2009 :

	53:00	88	254	15:16:28	(28.82%)	(71.18%)
8/12/2009	08:00	9	37	56:24	(1.15%)	(98.85%)
8/13/2009	07:00	13	52	01:20:56	(19.27%)	(80.73%)
8/14/2009	10:30	19	58	01:07:02	(10.64%)	(89.36%)
8/15/2009	08:00	13	68	39:02	(8.13%)	(91.87%)

*Weekly summary for user: Beth.Collier ending on: 8/15/2009 :

	33:30	54	215	04:03:24	(12.11%)	(87.89%)
8/18/2009	07:00	8	26	24:31	(5.84%)	(94.16%)
8/20/2009	07:00	2	4	45:00	(10.71%)	(89.29%)
8/21/2009	10:30	3	5	01:00:00	(9.52%)	(90.48%)
8/22/2009	10:30	3	5	01:00:00	(9.52%)	(90.48%)

*Weekly summary for user: Beth.Collier ending on: 8/22/2009 :

	35:00	16	40	03:09:31	(9.02%)	(90.98%)
8/23/2009	09:15	3	5	01:00:00	(10.81%)	(89.19%)
8/24/2009	09:45	3	5	01:00:00	(10.26%)	(89.74%)
8/25/2009	07:00	2	4	45:00	(10.71%)	(89.29%)
8/26/2009	10:00	7	9	03:14:05	(32.35%)	(67.65%)
8/27/2009	07:00	4	8	01:15:00	(17.86%)	(82.14%)
8/28/2009	10:00	7	8	02:00:00	(20.00%)	(80.00%)

*Weekly summary for user: Beth.Collier ending on: 8/28/2009 :

	53:00	26	39	09:14:05	(17.42%)	(82.58%)
--	-------	----	----	----------	----------	----------

Print Date: Thursday, September 09, 2010 11:50:43 AM

Page 7 of 4,294,967,295

***Note: Reports 4 and 5 have the parameters of specify: Unit name, list of Unit Names, or a range of Unit Names; a Date and Time range, or a set of ranges; a User, list of users, or a range of Users.**

- **Report 6 - Headcount Summary:** Scheduled vs. Forecasted - This report displays the summary of scheduled and forecasted headcount reported in 15-minute intervals for a given schedule.

Headcount Summary: Scheduled vs Forecasted

Schedule range: I-zzz
Users: I-zzz ; ""



INTERACTIVE INTELLIGENCE

Forecast Schedule Date range: 01/05/2006 00:00:00 - 09/09/2010 23:59:59
Schedule Date/Time Range: 01/05/2006 00:00:00
09/09/2010 23:59:59

New Schedule

Scheduling Unit: Customer Service - Help Desk
Published on date/time: 02/11/2010 12:11:02

Wednesday, February 10, 2010

☒ S : Scheduled ACD ☐ F : Forecasted ☐ D : Difference

	6				7				8				9				10				11			
S	5	5	5	5	5	5	5	5	9	8	10	9	9	10	9	9	13	13	11	10	9	13	13	13
F	24.72	24.72	28.84	28.84	20.60	20.60	27.81	27.81	22.66	22.66	24.72	24.72	24.72	24.72	25.75	25.75	24.72	24.72	23.69	23.69	22.66	22.66	25.75	25.75
D	-19.72	-19.72	-23.84	-23.84	-15.60	-15.60	-22.81	-22.81	-13.66	-14.66	-14.72	-15.72	-15.72	-14.72	-16.75	-16.75	-11.72	-11.72	-12.69	-13.69	-13.66	-9.66	-12.75	-12.75

	12				13				14				15				16				17			
S	10	10	13	12	11	12	12	12	16	17	18	17	16	16	15	15	18	16	16	14	15	16	16	17
F	22.66	22.66	24.72	24.72	25.75	25.75	26.78	26.78	24.72	24.72	24.72	24.72	23.69	23.69	24.72	24.72	24.72	24.72	23.69	23.69	23.69	23.69	23.69	23.69
D	-12.66	-12.66	-11.72	-12.72	-14.75	-13.75	-14.78	-14.78	-9.72	-7.72	-6.72	-7.72	-7.69	-7.69	-9.72	-9.72	-6.72	-8.72	-7.69	-9.69	-8.69	-7.69	-7.69	-6.69

	18				19				20				21				22				23			
S	21	21	16	16	13	16	19	19	15	16	13	14	13	16	15	17	14	16	14	14	15	16	13	16
F	24.72	24.72	23.69	23.69	23.69	23.69	24.72	24.72	24.72	24.72	25.75	25.75	24.72	24.72	24.72	24.72	22.66	22.66	24.72	24.72	23.69	23.69	24.72	24.72
D	-3.72	-3.72	-7.69	-7.69	-10.69	-7.69	-5.72	-5.72	-9.72	-8.72	-12.75	-11.75	-11.72	-8.72	-9.72	-7.72	-8.66	-6.66	-10.72	-10.72	-8.69	-7.69	-11.72	-8.72

Mean Absolute Deviation: 10.79
Standard Deviation: 9.09
Number of schedulable time periods: 90

Print Date: Thursday, September 09, 2010 11:58:47AM

Page 84 of 4,294,967,295

***Note: Parameters for Report 6 is specify: a Schedule Name, list of Schedule Names, or a range of Schedule Names; a Forecast Schedule Date and Time range; a User, list of Users, or range of Users; a Start Date and Time for the report; and an End Date and Time.**

- **Report 7 - Individual Schedule Detail:** The Individual Schedule Detail report is an Interaction Optimizer scheduling report. It shows the work activities of the Interaction Optimizer published schedule for an individual. Use this report to view planned activities for an individual's work load based on an Interaction Optimizer schedule generated for anticipated workload. This report shows start and stop times for each activity, and includes Total and Paid hours.

Individual Schedule Summary

Schedule: l-zzz
 Publish date: 01/05/2008 00:00:00 - 09/09/2010 23:59:59
 Users: l-zzz



INTERACTIVE INTELLIGENCE

Username: **Beth.Collier**

Schedule: **March Week 3**

Sunday 3/21/10	Monday 3/22/10	Tuesday 3/23/10	Wednesday 3/24/10	Thursday 3/25/10	Saturday 3/27/10	
Total hours: 09:15:00	Total hours: 10:30:00	Total hours: 07:00:00	Total hours: 10:00:00	Total hours: 07:00:00	Total hours: 09:15:00	
Paid hours:	Paid hours:	Paid hours:	Paid hours:	Paid hours:	Paid hours:	
Break :30:00	Break :30:00	Break :15:00	Break :30:00	Break :15:00	Break :30:00	
Meal :30:00	Meal :30:00	Meal :30:00	Meal :30:00	Meal :30:00	Meal :30:00	
ACD 08:15:00	ACD 09:30:00	ACD 06:15:00	ACD 09:00:00	ACD 06:15:00	ACD 08:15:00	

weekly paid hours

Print Date: Thursday, September 09, 2010 12:16:52PM

Page 1 of 3,527

***Note:** The parameters for this report are the specified a Schedule Name and a start and end range to include in a report. Workforce can also specify a Published Date and user names to include in a report.

- **Report 8 – Optimizer Actual vs. Forest Historical Analysis Report:** This report displays the offered interactions, completed interactions, ACD talk time, and Number ACW for actual and forecasted volumes.

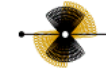
Actual vs Forecast Historical Analysis

Forecast Start Date Time: 08/01/2010 00:00:00

Site ID Range: 0 to 999

Workgroup(s): I-222

Skills tracked



INTERACTIVE INTELLIGENCE

Help Desk		Volume Differences (Actual minus Forecast)					Actual Volumes					Forecasted Volumes				
Date	Interval (Half-Hour)	Offered	Completed	ACD Talk Time	Number ACW	ACW Complete	Offered	Completed	ACD Talk Time	Number ACW	ACW Complete	Offered	Completed	ACD Talk Time	Number ACW	ACW Complete
	4:30 PM	-3	-4	-01:49	-2	-00:04						69	69	03:11:09	69	:22:24
	5:00 PM	13	10	-04:31	9	-03:34	81	77	03:09:26	77	:25:40	68	67	03:13:57	68	:22:06
	5:30 PM	4	5	-11:36	4	-01:14	72	73	03:11:43	73	:24:00	68	68	03:23:19	69	:22:46
	6:00 PM	6	5	-00:02	5	-02:28	80	77	03:07:04	78	:26:00	74	72	03:07:06	73	:23:32
	6:30 PM	5	4	-06:05	4	-01:59	76	74	03:23:40	74	:24:40	71	70	03:17:35	70	:22:41
	7:00 PM	1	8	-00:58	6	-01:47	66	71	03:15:10	71	:23:00	65	63	03:16:08	65	:21:13
	7:30 PM	2	-2	-08:07	0	-00:04	71	65	03:05:50	67	:22:20	69	67	03:13:57	67	:22:16
	8:00 PM	4	7	-02:12	6	-02:10	71	72	03:14:42	72	:23:40	67	65	03:16:54	66	:21:30
	8:30 PM	5	2	-01:49	2	-01:16	71	67	03:21:27	68	:22:40	66	65	03:19:38	66	:21:24
	9:00 PM	7	6	-32:21	5	-02:14	72	71	03:43:28	71	:23:40	65	65	03:11:07	66	:21:26
	9:30 PM	5	5	-18:56	4	-01:53	75	71	03:25:13	71	:23:40	70	66	03:06:17	67	:21:47
	10:00 PM	11	16	-34:15	15	-04:40	73	77	03:36:53	77	:25:00	62	61	03:02:38	62	:20:20
	10:30 PM	6	4	-06:28	6	-02:17	72	68	03:12:23	70	:23:20	66	64	03:05:55	64	:21:03
	11:00 PM	5	4	-20:46	4	-01:31	72	69	03:29:04	69	:23:00	67	65	03:08:18	65	:21:29
	11:30 PM	11	18	-03:13	17	-05:14	77	81	03:14:01	81	:26:20	66	63	03:10:48	64	:21:06
Daily Totals:		265	349	09:37:50	349	02:00:53	3340	3317	152:56:54	3347	18:25:20	3075	2,968	143:19:04	2998	16:24:27

Print Date : Thursday, September 09, 2010 12:22:28 PM

Interactive Intelligence, Inc.

Page 22 of 4,294,967,295

***Note:** The parameters for this report are specify: the Forecast start Date and Time; a Schedule Name, list of Schedule Names, or range of Schedule Names; a queue name, list of queues, or range of queues; a Site ID, list of site IDs, or range of site IDs; and if Workforce wants tracking skills.

- **Report 9 - Optimizer Time Off Request Report by Customer Service Representative (CSR):** This report displays the time off request by CSR, and includes: Request Date, CSR, Request Type, the state of the request, Time Off Duration, and indicates if the request is Paid Time Off.

Optimizer Time Off Request Report By Agent

Date Time Range: 1/5/2010 5:00:00 AM to: 9/10/2010 3:59:59 AM

INTERACTIVE INTELLIGENCE

Agent(s): 1 to zzz

Agent	Request Date	Request Type	Request State	Time Off Duration hh:mm:ss	Paid Time Off
Beth Collier					
	8/14/2008	Full Day	Approved	08:00:00	No
	8/21/2008	Full Day	Pending	08:00:00	Yes
	9/4/2008	Full Day	Approved	08:00:00	No
	4/21/2009	Full Day	Approved	08:00:00	Yes
	6/21/2010	Full Day	Approved	08:00:00	No
Bob Tomatoe					
	3/23/2009	Full Day	Approved	08:00:00	Yes
Chris Herr					
	6/30/2010	Full Day	Approved	08:00:00	No
	7/12/2010	Full Day	Denied	08:00:00	No
	9/1/2010	Full Day	Submitted	08:00:00	No
Dave Johnson					
	8/25/2009	Partial Day	Pending	04:00:00	Yes
	8/31/2009	Partial Day	Approved	04:00:00	Yes
Doug Mygrant					
	9/4/2009	Partial Day	Denied	03:30:00	No
	7/6/2010	Partial Day	Submitted	02:30:00	No
Gino Andre					
	3/10/2009	Full Day	Approved	08:00:00	No
	7/30/2009	Full Day	Submitted	08:00:00	No
	4/20/2010	Partial Day	Approved	01:00:00	Yes
	8/30/2010	Partial Day	Denied	01:00:00	No
Jason Braun					
	8/15/2008	Full Day	Approved	08:00:00	Yes
Jason Lee					

Print Date: Thursday, September 09, 2010 12:04:44 PM

Interactive Intelligence, Inc.

Page 1 of 5

***Note:** The parameters for this report are specified: a Begin Date and Time; an End Date and Time; a User, list of Users, or a range of Users; a type of request; and a value for the status of the request.

- **Report 10 - Optimizer Time Off Request Report by Scheduling Unit:** This report displays the time off request by scheduling unit, and includes: Request Date, CSR, Request Type, the state of the request, Time Off Duration, and indicates if the request is Paid Time Off.

Optimizer Time Off Request Report By Scheduling Unit

Date Time Range: 1/5/2010 5:00:00AM to: 9/10/2010 3:59:59AM



INTERACTIVE INTELLIGENCE

Scheduling Unit: !: zzz

Scheduling Unit	Request Date	Agent	Request Type	Request State	Time Off Duration hh:mm:ss	Paid Time Off
Customer Service - Help Desk						
	7/12/2008	Linda.Herr	Full Day	Approved	08:00:00	No
	8/14/2008	Beth.Coller	Full Day	Approved	08:00:00	No
	8/16/2008	Linda.Herr	Full Day	Approved	08:00:00	No
	8/19/2008	Jason.Braun	Full Day	Approved	08:00:00	Yes
	8/21/2008	Beth.Coller	Full Day	Pending	08:00:00	Yes
	9/4/2008	Beth.Coller	Full Day	Approved	08:00:00	No
	9/27/2008	Linda.Herr	Full Day	Approved	08:00:00	No
	11/25/2008	Linda.Herr	Full Day	Approved	08:00:00	No
	12/14/2008	Linda.Herr	Full Day	Approved	08:00:00	No
	1/17/2009	Linda.Herr	Full Day	Approved	08:00:00	No
	1/19/2009	Linda.Herr	Full Day	Approved	08:00:00	No
	1/21/2009	Linda.Herr	Partial Day	Approved	04:00:00	No
	1/23/2009	Linda.Herr	Full Day	Submitted	08:00:00	No
	1/23/2009	Linda.Herr	Full Day	Submitted	08:00:00	No
	1/23/2009	Linda.Herr	Partial Day	Submitted	:30:00	No
	2/16/2009	Latrese.Treast	Full Day	Approved	08:00:00	No
	2/17/2009	Latrese.Treast	Full Day	Approved	08:00:00	No
	3/6/2009	Linda.Herr	Full Day	Submitted	08:00:00	No
	3/10/2009	Gloria.Aldre	Full Day	Approved	08:00:00	No
	3/23/2009	Bob.Tomatoe	Full Day	Approved	08:00:00	Yes
	3/25/2009	Linda.Herr	Partial Day	Approved	04:00:00	No
	3/25/2009	Linda.Herr	Full Day	Approved	08:00:00	Yes
	4/6/2009	Linda.Herr	Full Day	Submitted	08:00:00	No
	4/21/2009	Beth.Coller	Full Day	Approved	08:00:00	Yes
	5/28/2009	Linda.Herr	Full Day	Denied	08:00:00	No

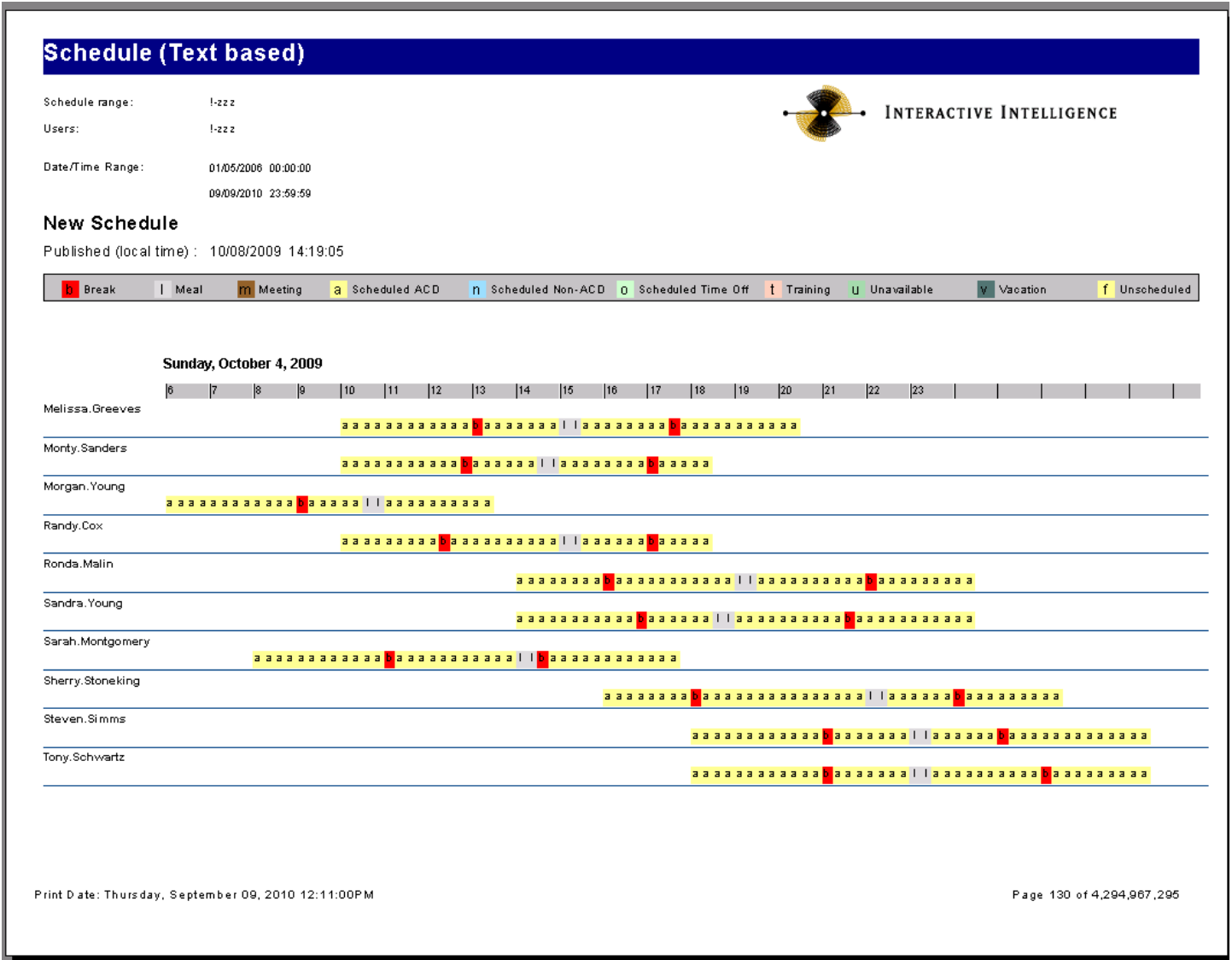
Print Date: Thursday, September 09, 2010 12:06:09 PM

Interactive Intelligence, Inc.

Page 1 of 4

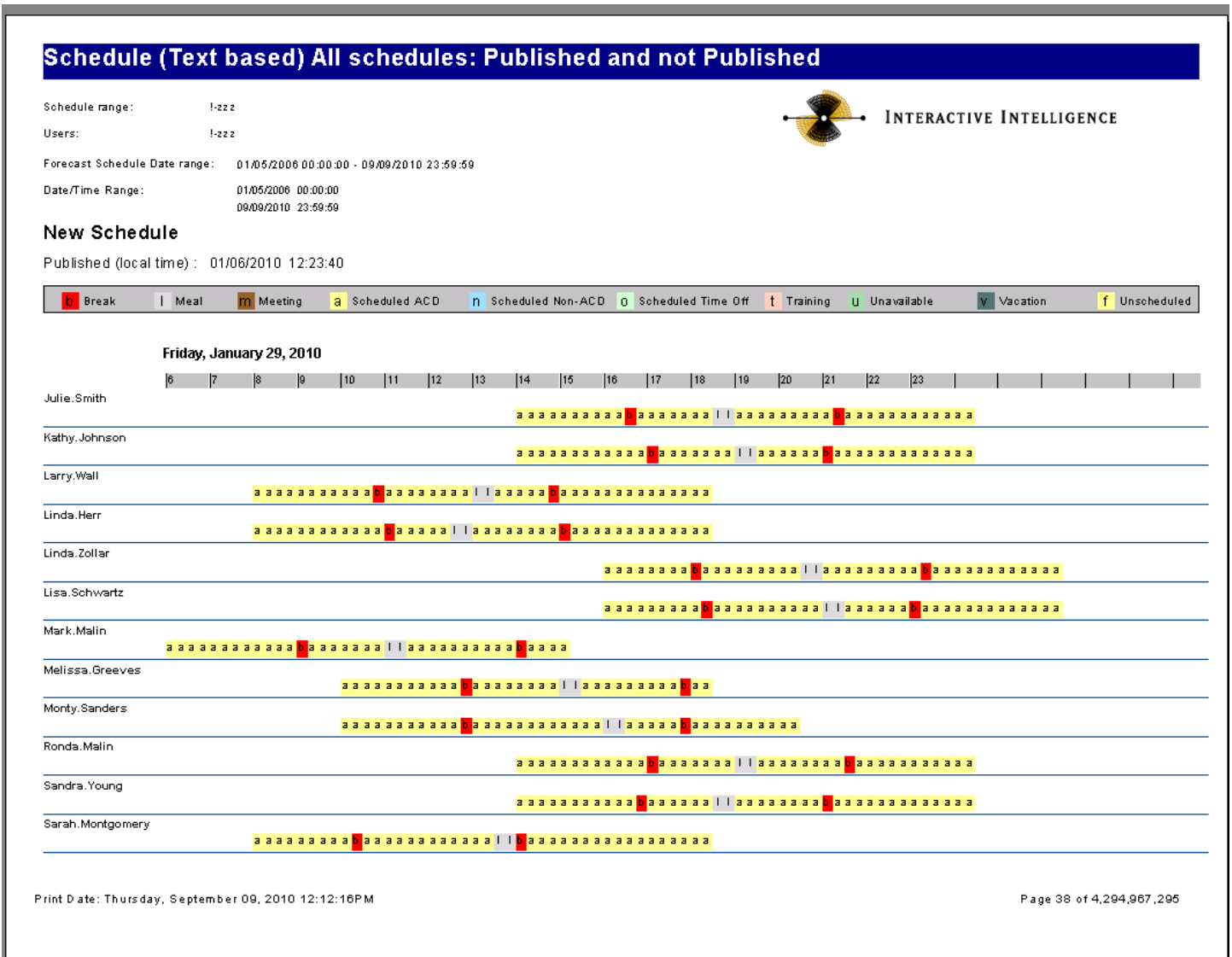
***Note:** The parameters for this report are specify: a Begin Date and Time; an End Date and Time; a User, list of Users, or a range of Users; a type of request; a value for the status of the request; and a Unit Name, list of Unit Names, or a range of Unit Names.

- **Report 13 - Schedule (text based):** The Schedule (text based) is a report based on the published employee schedules generated by Interaction Optimizer. This report displays a text-based graph of individuals' start and end times--in 15 minute intervals--of planned work shift activities, for a specified date and time range. Use this report to view a summary of planned work shift activities for a group of individuals in a text-based graph format. This graph can be printed in color or black and white.



***Note:** The parameters for this report are specified a Schedule Name and a start and end range to include in a report. Workforce can also specify a Published Date, user names, and the beginning and ending date and time to include in a report.

- **Report 14 - Schedule (Text Based) All schedules:** Published and not Published: This report displays a text-based graph, for non-graphical printers, of published and not published scheduled activities in intervals of 15 minutes for selected users.



***Note:** The parameters for this report are specified is a Schedule Name, a list of Schedule Names, or a range of Schedule Names; a Forecast Schedule Date/Time range; a User, list of Users, or range of Users; and a Begin Date and Time, and an End Date and Time.

- **Report 15 - Schedule Report (List):** The Schedule Report (List) is based on the published employee schedules generated by Interaction Optimizer. This report lists individuals' start and end times of planned work shift activities, for a specified date and time range. Use this report to view the details of planned work shift activities for a group of individuals.

Schedule (List)

Schedule range: l-zzz

Users: l-zzz

Date/Time Range: 01/05/2006 00:00:00

09/09/2010 23:59:59



INTERACTIVE INTELLIGENCE

March Week 3

Published (local time) : 03/25/2010 18:16:29

Sunday, March 21, 2010

Beth.Collier

Total time: 09:15:00

06:00:00	09:00:00	Scheduled ACD
09:00:00	09:15:00	Break
09:15:00	10:30:00	Scheduled ACD
10:30:00	11:00:00	Meal
11:00:00	14:00:00	Scheduled ACD
14:00:00	14:15:00	Break
14:15:00	15:15:00	Scheduled ACD

Chris.Herr

Total time: 10:30:00

14:00:00	17:00:00	Scheduled ACD
17:00:00	17:15:00	Break
17:15:00	18:30:00	Scheduled ACD
18:30:00	19:00:00	Meal
19:00:00	21:45:00	Scheduled ACD
21:45:00	22:00:00	Break
22:00:00	00:30:00	Scheduled ACD

Doug.Mygrant

Total time: 10:30:00

08:00:00	10:15:00	Scheduled ACD
10:15:00	10:30:00	Break
10:30:00	12:30:00	Scheduled ACD
12:30:00	13:00:00	Meal
13:00:00	14:45:00	Scheduled ACD
14:45:00	15:00:00	Break
15:00:00	18:30:00	Scheduled ACD

Dale.Pierce

Total time: 10:30:00

14:00:00	17:00:00	Scheduled ACD
17:00:00	17:15:00	Break
17:15:00	18:30:00	Scheduled ACD
18:30:00	19:00:00	Meal
19:00:00	21:15:00	Scheduled ACD
21:15:00	21:30:00	Break
21:30:00	00:30:00	Scheduled ACD

Elizabeth.Sanders

Total time: 10:30:00

16:00:00	19:00:00	Scheduled ACD
19:00:00	19:15:00	Break
19:15:00	21:00:00	Scheduled ACD
21:00:00	21:30:00	Meal
21:30:00	00:00:00	Scheduled ACD
00:00:00	00:15:00	Break
00:15:00	02:30:00	Scheduled ACD

Bob.Tomatoe

Total time: 10:30:00

18:00:00	21:00:00	Scheduled ACD
21:00:00	21:15:00	Break
21:15:00	00:00:00	Scheduled ACD
00:00:00	00:30:00	Meal
00:30:00	01:00:00	Scheduled ACD
01:00:00	01:15:00	Break
01:15:00	04:30:00	Scheduled ACD

Dave.Johnson

Total time: 10:30:00

14:00:00	16:15:00	Scheduled ACD
16:15:00	16:30:00	Break
16:30:00	19:00:00	Scheduled ACD
19:00:00	19:30:00	Meal
19:30:00	21:15:00	Scheduled ACD
21:15:00	21:30:00	Break
21:30:00	00:30:00	Scheduled ACD

Brian.Williams

Total time: 08:00:00

06:00:00	09:00:00	Scheduled ACD
09:00:00	09:15:00	Break
09:15:00	12:00:00	Scheduled ACD
12:00:00	12:30:00	Meal
12:30:00	14:00:00	Scheduled ACD

Print Date: Thursday, September 09, 2010 12:07:21PM

Page 1 of 2,475

***Note:** The parameters for this report are specified Schedule Name and a start and end range to include in a report. Workforce can also specify a Published Date, user names, and the beginning and ending date and time to include in a report.

- **Report 16 - Schedule Unit Detail:** This report displays detailed Interaction Optimizer Schedule Unit information.

Scheduling Unit Detail Report

Scheduling Unit: !-zzz;"

Scheduling Unit: Accounting

Workgroup: Accounting

Default Service Level:

Service level selected: Yes

Percent answered: 80

Within time period (seconds): 20

Average speed of answer? No

Utilization:	Interaction Type	Percent Utilization	Maximum Assignable
	Call Back	100	1
	Email	100	1
	Chat	100	1
	Call	100	1
	Generic Object	100	1

Miscellaneous:

Uses Skills? Yes

Miscellaneous Configuration:

Weeks of ACD data to import for forecasting: 6

Start day of week: Monday

Shrinkage factor: 1.00

Weekly Shift Definition: 7a-4p

Required days: Monday, Tuesday, Wednesday, Thursday, Friday

Optional days: None

Earliest shift start time: 7:00 AM

Latest shift start time: 9:00 AM

Start time increment: 0:30

Latest shift stop time? No

Minimum paid time: 4:00

Maximum paid time: 10:00

Minimum contiguous work time? No

Maximum contiguous work time? No 5:00

Activities:

Type	Rel. Time	Earliest Start	Latest Start	Length	Start time inc.	Paid?	Contiguous?
None							

Agent(s):

Andrea.Bennett, Andrew.Jacobs, Andrew.Rogovin, Andy.Gunther

Shift Rotations:

None

Print Date: Tuesday, September 09, 2010 12:13:17 PM

Page 1 of 6

***Note:** The parameters for this report are specified scheduling Unit Name or a range of scheduling Unit Names to include in a report.

4. HELP (Additional Information)

Interaction Client is available in two different editions: Interaction Client .NET Edition and Interaction Client Web Edition. It is also available as the Interactive Intelligence Right Now Integration. In this help system, "Interaction Client" denotes the specific edition the users are using. The full product name appears at the top of each help topic. The full product name may also be used in a help topic when necessary to distinguish between Interaction Client editions.

4.1.1.Search

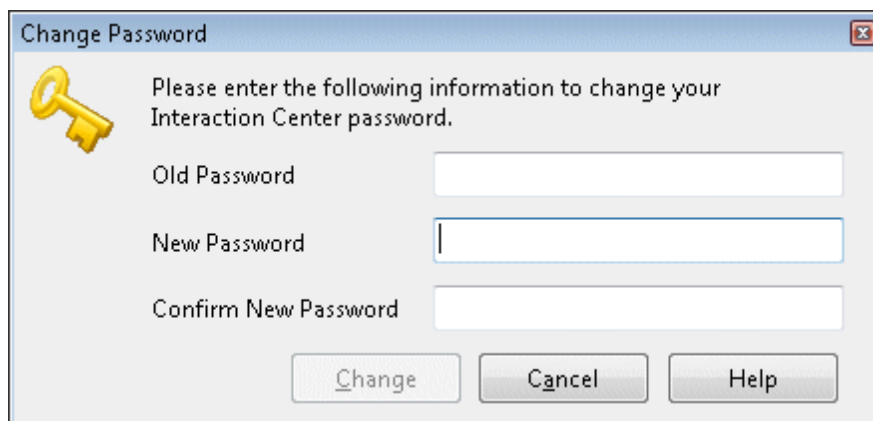
A user can search for specific terms in both the HTML and the WebHelp versions of the help. There is a basic search and an advanced search available from the Search tab. A basic search is simple: just type whatever single word or phrase they want to search, press [enter] or click the **List Topics** button (HTML version only), and a list of topics containing that word or phrase is displayed. When searching for a phrase, use quotation marks to enclose the phrase.

An advanced search involves wildcard (HTML version only) and Boolean expressions. Wildcard expressions allow them to search for one or more characters using an asterisk or question mark. Wildcard search examples:

"Wildcard" Search Examples	
Term(s)	Results
Init*	Initial, initiate, etc.
1?3	123, 133, 143, etc.
Alert AND urgent	Results containing the word "alert" and "urgent"
Chat OR call	Results containing the word "chat" or "call"
Speed NOT accuracy	Results containing "speed", but not the word "accuracy"

4.1.2.Change User's Password

1. From the File menu, select Change Password. The Change Password dialog box appears.



The image shows a "Change Password" dialog box with a yellow key icon. It contains three text input fields: "Old Password", "New Password", and "Confirm New Password". Below the fields are three buttons: "Change", "Cancel", and "Help".

2. In Old Password, enter their current Interaction Center password.
3. In New Password, enter their new IC password.

4.1.3. Logon dialog box

The Logon dialog box has two tabs: Connection and Options.

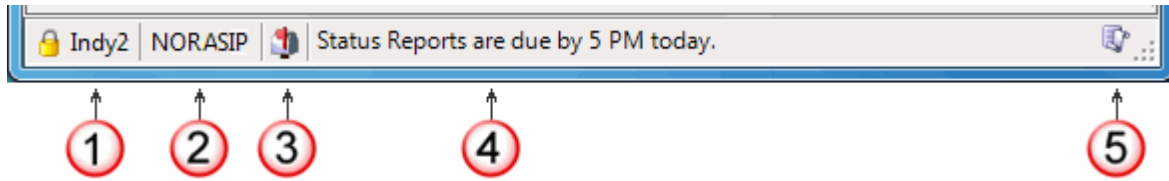
The screenshot shows the 'Interaction Client' dialog box with the 'Connection' tab selected. The 'Options' tab is also visible. The 'Connection' tab contains the following fields and controls:

- ☐ Use Windows Authentication
- User: Noreen.Took
- Password: [masked with dots]
- ☒ Save Password
- Server: Indy1
- Station Type: Workstation (dropdown menu)
- Workstation: NOREENTOOK

At the bottom of the dialog are the 'Logon' and 'Cancel' buttons.

4.1.4.Status Bar

The Interaction Client status bar has sections that display their current connection state, server name, station name, voice mail indicator, and notifications:



Status Bar Features

Number	Name	Description
1	Connection State	Click this section to connect if the users are disconnected. If they are connected, point to this section to display their IC User ID, IC server name, and Session Manager server name. A lock icon indicates that the connection is encrypted.
2	Station or Remote Number	Displays the name of their currently active workstation or their Remote Number.
3	Voice Mail Indicator	This icon is in color if they have one or more unheard voice mail messages. If the icon is dimmed, they do not have any voice mail messages.
4	Notification Area	This scrolling list displays their current notifications. For more information, see Supervisor Client Memos.
5	Message Viewer	Click this icon to display the Message Viewer and read all their current notifications.

4.1.5.Working with Calls

Interaction Client provides many ways to handle or manage calls. This section describes the following call features:

- Call Security
- Making Calls
- Picking Up Calls
- Transferring Calls
- Forwarding Calls
- Making Conference Calls
- Using Speed Dial
- Using Other Call Features

• Call Security

Interaction Center provides call security that prevents others from listening in on a call or even determining which internal parties are involved in a conversation.

Interaction Center administrators can configure the use of two encryption protocols to support encryption of call audio (SRTP) and call control information (TLS). This provides confidentiality and flexibility for security-sensitive organizations. The user's Interaction Center administrator can use Interaction Administrator to configure their station to use

SRTP for all their calls. When SRTP is not configured for a station, the calls are “non-encrypted” or not secure from network interception.

• Making Calls

There are a number of ways to make a call in Interaction Client. Enter a number in the Number field, use the buttons on their telephone, or use the dial pad in the Client. Double-click any phone number hyperlinks, doubleclick a directory entry, or select a directory entry and click any available dial button on the directory toolbar.

➤ Call an Operator

The user can use Interaction Client to call an operator within their company, or to call an external telephone operator.

1. To call an internal operator type 0 or the internal operator number in the Number field and click Make Call.
2. To call an external operator (i.e., Phone Company), do one of the following:
 - Type 00 in the number to dial field on the Windows Call Control toolbar and press Enter.
 - Type 00 or the internal operator number in the Number field and click Make Call.

➤ Call Back a Disconnected Call

1. Do one of the following:
 - Right-click the disconnected call and select Call Back from the pop-up menu.
 - Double-click the disconnected call.
 - Select the call and press the shortcut keys Ctrl+B.

The Call Back option dials the number of the selected call if the number is valid.

➤ Click to Dial a Directory Contact

1. The user can click any of the phone number hyperlinks in Interaction Client to dial a contact. Phone number hyperlinks appear in directory views and in the contact Properties dialog box.
2. If Auto Dial Extension is enabled for a contact's phone number, when they click the phone number hyperlink Interaction Client automatically dials the extension after the call connects.

Company Directory		IC Private Contacts			
Last Name	First Name	Company	Home Phone	Business Phone	Mobile
		Weather	(317) 222-2222		
Smith	Joe	XYZ Corp.	(317) 555-5959	(317) 555-2111 / ^211	
Took	Norman			(317) 555-0300	(317) 555-0994
Viewing contacts 1 to 3 of 3					
Dial Transfer Consult Conference Voicemail Park Business Camp Status Properties					

3. The user can also dial a phone number and extension by clicking an extension number hyperlink in the Properties dialog box.

- Click to Dial a Web Page Hyperlink
Interaction Client enables the user to use the CALLTO protocol to make calls. They can dial specially formatted phone numbers just by clicking them. The phone number must be formatted with the HTML tag <a href>. This tag is most often used to create a hyperlink to a webpage or a specific point in a webpage. However, it can also be used to create hyperlinks that place phone calls.
- Finding Phone Number Hyperlinks
Appropriately formatted phone number hyperlinks are not usually available on most web pages. However:
 - The user's company could set up a webpage on an internal site that contains appropriately formatted phone numbers.
 - Interaction Client can also dial using phone number hyperlinks from a third-party CRM system, if their CRM administrator ensures the phone numbers are appropriately formatted.
 - There are some internet browser add-on applications available that convert telephone numbers appearing on web pages into clickable links. If they use a browser add-on, it must convert the phone numbers using the CALLTO protocol to enable IC to place the call for them.

4.1.6.Call Transfer Shortcut Keys

Transferring a call without speaking to the intended recipient is called a blind transfer. Use a blind transfer if the user does not need to speak with the recipient before transferring the call. If the intended recipient does not answer, the call is sent to the recipient's voice mail.

Transferring a call after speaking with the intended recipient is called a consult transfer. Use a consult transfer if the user needs to speak with the recipient before transferring the call. If the intended recipient does not answer the phone, they can resume their conversation with the caller, transfer the call to the intended recipient's voice mail, or try transferring to another person.

- **To transfer a call by selecting a directory entry:**
Select a call, then select a directory entry and press Enter. This transfers the selected call to the default phone number or extension for the selected directory entry.

- **To use any of the following shortcut keys:**

1. Select a connected call.
2. Select the appropriate directory entry.
3. Press the shortcut key combination to transfer the call to one of the alternate configured numbers for the user.

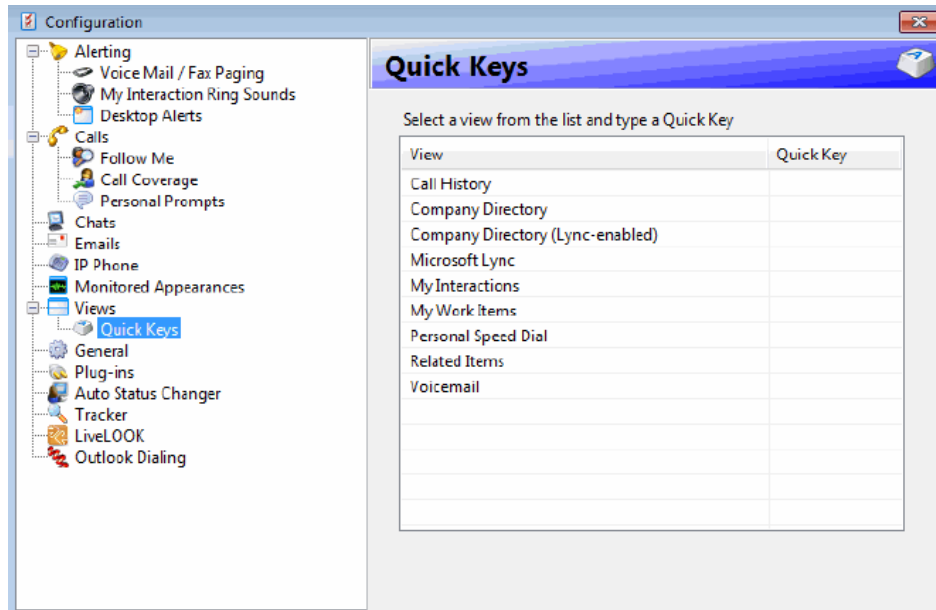
Shortcut Keys		
Transfer To...	No Consultation	After Consultation
Default Number	Enter	Ctrl+T
Assistant	Ctrl+Alt+R	Ctrl+Shift+R
Business	Ctrl+Alt+B	Ctrl+Shift+B
Business 2	Ctrl+Alt+U	Ctrl+Shift+U
Fax	Ctrl+Alt+F	Ctrl+Shift+F
Home	Ctrl+Alt+H	Ctrl+Shift+H
Home 2	Ctrl+Alt+O	Ctrl+Shift+O
Mobile	Ctrl+Alt+I	Ctrl+Shift+I
Pager	Ctrl+Alt+G	Ctrl+Shift+G

Operator Console Keyboard Shortcuts	
Shortcut	Features Description
Enter	Toggle a connected or alerting call between connected and hold states, or transfer the currently selected call to a selected directory entry.
Shift+Enter	Dial the default number for the currently selected directory entry.
Call Transfer Shortcut Keys	Transfer the currently selected call to any one of the alternate numbers configured for a directory entry.
Quick Keys	Create and use custom keyboard shortcuts for any view in Interaction Client .NET Edition.

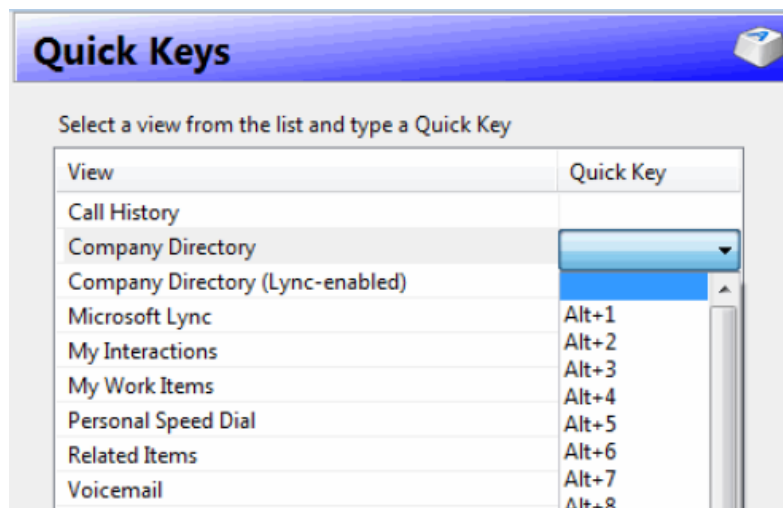
Quick Keys

Operator Console users can configure "Quick Keys," which are personal shortcut keys. Quick keys are used to move from one view to another within the interface. Users can assign pre-defined shortcuts to any existing client view and then use these shortcuts to navigate from view to view within the interface.

- From the Options menu, click Configuration, expand the Views node then click Quick Keys.



- In the Quick Keys properties details pane, select a view to which the user wants to assign a Quick Key. In the Quick Keys field for that view, do one of the following:
 - Select a key combination from the drop-down list.
 - Type one of the approved key combinations.



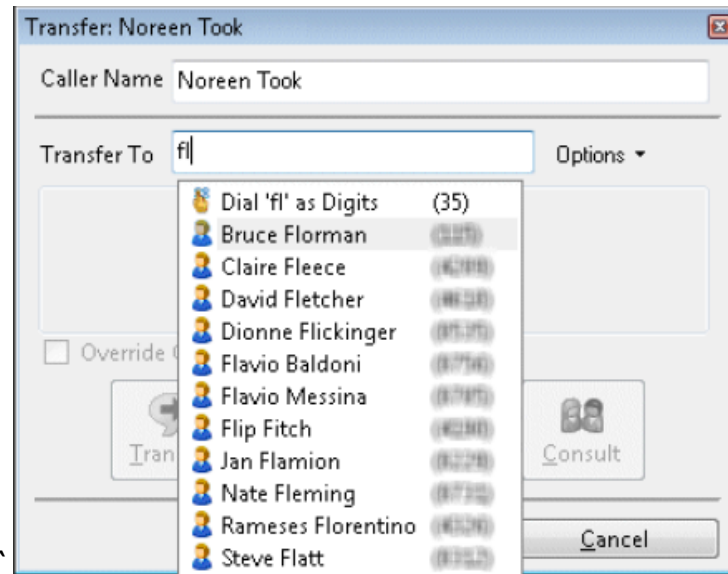
- Click OK.

- **Display Quick Keys**

1. From the Windows Start menu, select Interaction Client.
2. In the Logon dialog box, select the Options tab and click Add.
3. In the Setting Editor dialog box, in Setting Name, type EnableQuickKeys.
4. In Setting Value, type False. Click OK.

Rapid Transfer

1. Select a call and then start typing the extension, phone number, or name of the person to whom they want to transfer the call. This automatically opens the Transfer dialog box and displays a drop-down list of choices.



2. From the drop-down list, do one of the following. If the intended recipient is an IC user, status information for the selected IC user appears. It shows whether or not the transfer recipient is logged into Interaction Client and is able to accept the transferred call. This can help the user decide what kind of call transfer to use.
 - Select "Dial [the user's entry] as Digits" to convert a text entry into numbers.
 - Select the appropriate name and associated extension number.
3. Optionally, if they selected an IC user as a recipient, do one of the following. IC disregards any forwarding phone number set for this IC user in Call Coverage settings or Set Status Details.
 - Select the Override Call Forwarding check box to transfer the call to the IC user's extension.
 - Clear the Override Call Forwarding check box to transfer the call to the extension or phone number currently preferred by the IC user.
4. Click the Transfer button. The transferred call disappears from My Interactions or other queue and is routed to the selected recipient.

- **To transfer a call by selecting a directory entry:**

Select a call, then select a directory entry and press Enter. This transfers the selected call to the default phone number or extension for the selected directory entry.

- **Other Call Transfer Options**

Other Standard Methods for Transferring Calls:

Transfer a Call Using a Transfer Button

- Transfer a Call to a Directory Entry

- Transfer a Call to a Workgroup
- Transfer a Call After Consulting the Recipient
- Transfer a Call Without Consulting the Recipient
- Transfer a Call to Another Person's Voicemail
- Transfer a Call to the user's Voicemail
- Park a Call on Another Person's Extension
- Drag and Drop a Call on a Name in a Directory

4.1.7. Whisper Mode

Use Whisper mode to add themselves to a CSR's interaction on any queue they have permission to monitor. This enables them to talk to the CSR without the customer knowing. The CSR can hear their side of the conversation, but the customer cannot.

• To coach a CSR on an interaction:

1. Make sure they have permission to monitor a specific queue.
2. Highlight the interaction the Supervisor wants to join and click the Whisper Button or press Ctrl+W. The Listen button is activated on the client. An icon appears in the CSR's Lstns column in My Interactions.

4.1.8. Call History

The Call History view displays a listing of the user's incoming and outgoing calls. The tab is similar to a directory view. Some of the call information available includes Start date and time, End time, Number, Name, and Disposition as shown below. By default, the newest call appears first, but they can sort this view by clicking on any column heading. Their preferred sort order is used anytime they view Call History.

My Interactions My Work Items Call History						
Disposition	Name	Number	Start	End	Duration	Call Id
 Called	Weather Line	(317) 222-2222	Today, 1:19 PM	Today, 1:20 PM	0:00	1088760257
 Called	Carmel IN	(317) 846-6107	Today, 1:21 PM	Today, 1:23 PM	1:59	1088760270
 Answered	Kell, Jo	8888	Today, 4:27 PM	Today, 4:29 PM	2:13	1088766242
 Called	Weather Line	(317) 222-2222	Today, 5:46 PM	Today, 5:46 PM	0:11	1088768039

History Features

Item	Description
Disposition	▪ Answered: An incoming call that was answered. ▪ Called: An outbound call. ▪ Missed: An incoming call that was not answered. ▪ Unknown: This is displayed if the server has no information on whether the call was inbound or outbound.
Name	The name of the caller or the person called as found on the IC server or delivered by the Public Switched Telephone Network (PSTN) as part of Caller ID.
Number	For an outbound call, this is the number that was dialed. For an inbound

	call, this is the number of the caller.
Start	The time when the call is added to the user's queue.
End	The time when the call disconnected if it was still in their queue. If the call leaves the CSR's queue before being disconnected, the end time is when the call left their queue.
Duration	The difference in time between Start and End.
Call ID	The call identifier for the call can be handy if users must report a problem with a call to their administrator.

- **Displaying the Call History View**

- Re-adding the Call History view after the user removed it:
 1. Do one of the following:
 - From the File menu, chose New View.
 - Right-click a tab in the area where the user wants the Call History view to appear and select New View. The Create New View dialog box appears.
 2. From the Categories list, select Call History.
 3. In the Views list, select Call History. Then click OK.

- **Removing the Call History View**

To remove the Call History view, in the client window, right-click the Call History tab and click Close Call History.

- **Call History – Make Calls**

The user can click anywhere in a call history row or click directly on the Number hyperlink to dial the phone number associated with the call.

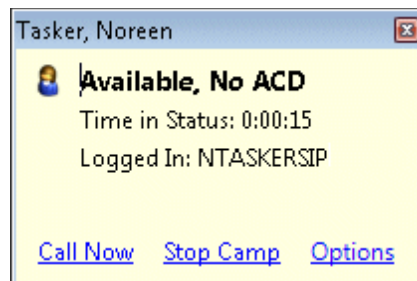
- **Call History Retention**

History is tracked for calls that appeared in My Interactions. These are calls that were inbound to the user, calls placed by the user, calls transferred to the user, and calls used to retrieve voice mail messages.

Call history is maintained by Client Services on the Interaction Center server. By default, call history information is retained for three (3) days or 300 calls, whichever comes first, per user. The amount of call history data stored per user depends on the version of Client Services running on the server and how it is configured by the IC administrator.

4.1.9.Camp Desktop Alert

The Camp desktop alert lets the user know when another user whose status they are monitoring, changes his status.



4.1.10. Using the Dial Pad

The Dial Pad enables the user to dial a phone number to place a call, send DTMF tones to a connected call, make selections from an automated telephone menu system, or end a connected call. They can also use the Dial Pad to dial and make another call while the selected interaction is on hold. The Dial Pad can also send DTMF tones through a connected SIP Soft Phone.

- **To display the Dial Pad:**

1. Do one of the following. The Create New View dialog box will appear.
 - From the File menu, choose New View.
 - Right-click a tab in the area where the user wants to add a view and click New View.
2. From the Categories list, select Dial Pad.
3. In the Views list, select Dial Pad. Then click OK. The Dial Pad view will appear in Interaction Client.

- **Use Dial Pad**

1. Display the Dial Pad.
2. Do one of the following:
 - Click the appropriate buttons on the Dial Pad to dial a phone number.
 - Select the Dial Pad tab and type the phone number on the user's keyboard.
3. One of the below items happens:
 - If they do not have a connected interaction or the selected interaction is on hold, the numbers appear in the Number field. Click the Make Call button and the number is dialed.
 - If they have a connected or selected interaction that is not on hold, the numbers are sent to the interaction. This can be used to make selections from an automated telephone menu system. It's just like using a touch tone phone Dial Pad.
 - If the user has a recent interaction selected in the Number dropdown list, the Number field is cleared and the numbers they press on the Dial Pad appear.
4. On the Dial Pad, click the Call button. The number is dialed.
5. After the call is connected, click buttons on the dial pad to make selections from an automated telephone menu system. It's just like using a touch tone phone dial pad.
6. Click the End button on the dial pad to disconnect the call.